

THE JOURNEY AFTER: A PHENOMENOLOGICAL EXAMINATION OF TEACHERS'  
TRANSFER OF LEARNING FROM A TWO-YEAR PROFESSIONAL DEVELOPMENT  
PROGRAM

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## **ABSTRACT**

This phenomenological study investigated lessons learned and factors affecting transfer of learning by participants who were involved in a 2-year reading professional development program (Pacific CHILD) in a remote area in the Western Pacific. The transfer of learning process was examined through the use of focus groups, semi-structured interviews, surveys, and artifacts. Individual and group descriptions were utilized to capture lived experiences and generate themes to formulate lessons learned. Results from this study showed that Pacific CHILD had a positive impact; teacher efficacy affected transfer of learning; and teachers preferred specific instructional practices to transfer. New positions and responsibilities given to participants, frequent changes, and conflicting conditions were factors affecting the transfer of learning for teachers. Implications for future studies include creating local supports after the conclusion of externally funded professional development programs, and examining the broader scope on how the frequency of transferring teachers to different instructional positions effect change.

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## ACRONYMS

<u>Acronym</u>	<u>Meaning</u>
ELL	English Language Learners
HIDOE	Hawaii Department of Education
LEA	Local Educational Agency
Pacific CHILD	Pacific Communities with High-performance In Literacy Development
PREL	Pacific Resources for Education and Learning
RTTT	Race to the Top
RCT	Randomized Control Trial
REL	Regional Educational Laboratory
SIOP	Sheltered Instruction Observation Protocol
U.S.	United States
USDOE	United States Department of Education

## **CHAPTER 1**

### **INTRODUCTION**

A memorable part of my journey of professional learning happened as a third-grade teacher. I was fortunate enough to work in an environment where job-embedded professional development, peer collaboration, and mentoring were a part of the school culture. The principal and leadership team made faculty members believe that lifelong learning was a reality. For example, one summer about ten teachers attended a training session to improve our knowledge and skills in early reading. Each day we learned concepts and theories about early reading and then practiced these ideas with our students. During our daily debrief we reflected upon our experiences, successes and challenges, and then anticipated how we might apply our learning in the upcoming school year. My principal was a participant as well. At first some of us thought his presence was intended to hold us accountable. However, at the end of the first week my principal, along with the rest of us, was assigned to improve the literacy skills of first-grade students. We knew then he was committed to this professional training.

Soon after our training before the school year began, my principal repeated his expectations that for the entire school year, all teachers who attended the summer training would become tutors for first-grade students that were performing below grade level in reading. Most of us were not first-grade teachers. However, my principal had arranged the schedule so the resource teachers delivered instruction to our students while we tutored. In the tutoring sessions, we applied the reading skills and theories from the summer session. Although my principal did not tutor, his experiences at the training sessions enabled him to gain insights into what teachers learned about early reading, and on the kinds of administrative decisions he needed to execute for the early reading program to be successful at our school. Thus, he had accomplished a

process called “transfer of learning”. I did not realize it at the time, but this early reading training was my first experience with transfer of learning, the theoretical framework for this study.

### **Purpose of the Study**

Transfer of learning is defined when learning from an initial situation is demonstrated in another context, and at a later time (Perkins & Salomon 1988, 1992, 2012). Each year teachers are involved in an extensive amount of time in professional development activities (Borko, 2004). There is an assumption that when teachers participate in professional development activities, any information obtained will automatically transfer into their classroom (Lightner, Benander, & Kramer, 2010; Perkins & Salomon, 1988). The transfer of learning process is integral in building teachers’ professional capacity. In addition to obtaining substantial knowledge during the initial learning, teachers must adapt, sustain, and make decisions on how to transfer this information into their current context (Antoniou & Kyriakides, 2013; Fullan, 1987, 2006; Leberman, McDonald, & Doyle, 2006; Perkins & Salomon, 2012). The literature is clear that more insights on what factors affect transfer are needed in addition to the actual transfer outcomes (Antoniou & Kyriakides, 2013; Cheng, 2015; Dinsmore, Baggetta, Doyle, & Loughlin, 2014; Leberman et al., 2006; Perkins & Salomon, 2012). The need for more insights into the factors that affect transfer was the point of this research.

The purpose of this phenomenological study was to identify lessons learned about transfer and factors that affected the transfer of learning process by participants who were involved in a long-term reading professional development program. This professional development program, called Pacific Communities in High-performance In Literacy Development (Pacific CHILD), was an externally developed and evaluated professional program

for teachers from 2007-2009 in a remote location in the Western Pacific. My investigation of the transfer of learning from Pacific CHILD took place six years after Pacific CHILD was delivered to the teachers on “Veritas Island”, a pseudonymous landmass in the U.S. territory of “Juntos” in the Western Pacific.

### **Professional Development**

Professional development has been investigated in areas of program designs (e.g., Desimone, Porter, Garet, Yoon, & Birman, 2002; Garet, Porter, Desimone, Birman, & Yoon, 2001), student outcomes (e.g., Abe, Thomas, Sinicrope, & Gee, 2012; Buczynski & Hansen, 2010), and teacher knowledge (e.g., Borko & Putnam, 1995; Goldschmidt & Phelps, 2010). These multifaceted perspectives of professional development have contributed significantly to the field of education. Some claim that more work is needed (Garet et al., 2001; Gersten, Dimino, Jayanthi, Kim, & Santoro, 2010; Hill, Beisiegel, & Jacob, 2013; Yoon, Duncan, Lee, Scarloss, & Shapely, 2007). In particular, some have critiqued that professional development designs and the integration of research-based practices do not have as great an influence as expected in improving education (Hill et al., 2013; Koellner & Jacobs, 2015; Nelson, Leffler, & Hansen, 2009). Others argue that frequent changes in policy and mandates make it difficult for professional development programs to be successful (Darling-Hammond & McLaughlin, 2011; Hill et al., 2013; Nelson et al., 2009; Sykes, 1996).

Professional development activities cannot be viewed as a single phenomenon. Teachers need to have a mindset and belief that what they learn in professional development has value, and should be practiced beyond the activity and into the very settings they live in daily (Klingner, Vaughn, Hughes, & Arguelles, 1999; Murrill, Thomas, & Reynolds, 2013; Timperley & Phillips, 2003). Murrill et al., (2013) explained that professional development venues are just the

beginning and not the end. They further asserted, “the ultimate site to determine the effectiveness of professional development is each teacher’s classroom” (Murrill et al., 2013, p. 2). According to McDonald (2010), professional development and transfer of learning and are an interactive dynamic. Both are needed for teacher and program success, and at the same time, both have been largely overlooked as an integrative concept. This study is an attempt to fill this gap.

### **Background of the Study**

The backdrop and the focus of this study are on the long-term impact of Pacific CHILD, a reading professional development program and evaluation study conducted in a remote area of the Western Pacific. Drawing upon Pacific CHILD’s impact explains the initial learning in the transfer process that participants had experienced for two years. Borko (2004) asserted, “To understand teacher learning, we must study it within these multiple contexts, taking into account both the individual teacher-learners and the social systems in which they are participants” (p. 3). To provide context for this study, this section describes the inception of Pacific CHILD, discusses the program design, and concludes with the Pacific CHILD evaluation study results.

I began my career working as an elementary classroom teacher in a Title I school. Title I schools receive federal funds based on the high percentage of students who come from low-income families (United States Department of Education, 2005a). These funds are intended to assist students with meeting academic standards. In my classroom, many of my students were struggling readers and benefitted from Title I funded initiatives. A few years later as a Title I Resource Teacher, I began to lead and design professional learning activities and courses in cooperation with in-service teachers who were cognizant of the context of students’ and teachers’ lives. When I changed career and became a Reading Specialist at a non-profit organization,



Pacific Resources for Education and Learning (PREL), my work with in-service teachers increased and broadened in the areas of literacy, curriculum development, and assessment. I was fortunate to collaborate with many educators in different remote areas of the Western Pacific. I also expanded my understanding of how federal monies influenced educational decisions in these settings. My work at PREL is the link to this study.

During the Pacific CHILD program, I was the overall team leader delivering professional development activities to participants, primarily in Hawaii. I was involved in a few sessions on Veritas Island (the site for this study) and met many educators, including the participants, some of who became participants of this study. When Pacific CHILD ended, my interest was piqued. I wanted to know what teachers would do with this working knowledge. As Hargreaves and Fink (2003) explained, part of sustainable improvement is investing in teacher skills in ways that will endure over a period of time. These participants had devoted two years of their professional life to this program. I was motivated to do this dissertation to find out what impact this professional training had on participants over time.

### **Inception of Pacific CHILD**

In 2006, the Institute of Educational Sciences at the United States Department of Education (USDOE) awarded over \$300 million to ten Regional Educational Laboratory (REL) programs (United States Department of Education, 2006). Since 1966, policy makers have incorporated the REL work in federal policies such as the Elementary and Secondary Act (Guthrie, 1989). The major purpose for the REL was to serve as a link between research and practice (United States Department of Education, n.d.). One of those tasks involved conducting evaluation studies using a randomized control trial (RCT) design in educational settings throughout the U.S. and the U.S. affiliated territories. A RCT is a quantitative research design

intended to test the effectiveness of an intervention by assigning participants to an experimental or a control group (Abe et al., 2012). Researchers control the investigation by exposing the intervention to the experimental group but not the control group. The difference in outcomes determines the effectiveness of the intervention. Many perceive RCT as the gold standard of educational research (Hesse-Biber, 2012; Hill et al., 2013; Nelson et al., 2009).

Pacific Resources for Education and Learning (PREL), a non-profit organization based in Honolulu, Hawaii, was an awardee of the REL contract for the Pacific region. Since 1990, PREL has been providing educational services in Hawaii, the U.S. territories of Guam and American Samoa, the Commonwealth of the Northern Marianas Islands (CNMI), and the affiliated nations of the Republic of the Marshall Islands, Republic of Palau, and the Federated States of Micronesia. PREL developed two different versions of Pacific CHILD. The first model was an investigation on the professional development components in early reading (Chesswas, Keir, Leung, & Terada, 2005). P-CHILD, as this first project was known, was implemented from 2000-2005. The second version, Pacific CHILD and the focus of this study, was a two-year reading professional development program. Part of Pacific CHILD's mandate, as mentioned, was also an RCT study. The Pacific CHILD program served as the intervention, according to the REL contract from 2007-2009.

### **Pacific CHILD Design**

Pacific CHILD was one of the largest RCTs in the Pacific region, and implemented in American Samoa, CNMI, and Hawaii. The study included 45 schools, 197 fourth and fifth-grade teachers, and 3,052 students (Abe et al., 2012). Twenty-three schools were designated as treatment schools and received the intervention (i.e., Pacific CHILD). Twenty-two control schools did not. Of the 197 teachers, 95 teachers received the intervention (or treatment) and

102 did not as they were part of the control group. The three study outcomes measured the impact on student achievement, teacher practice, and teacher knowledge between the treatment and control groups. PREL staff designed the Pacific CHILD program using research based practices such as adult learning theory, job-embedded practices, and focusing on one content area (Pacific Resources for Education and Learning, 2011).

Adult learning theory emphasizes the importance of utilizing any assets that adults bring to the experience (Knowles, 1972; Lyons & Pinnell, 2001; Marshak, 1983). These assets include metacognition, problem solving skills, and experience (Baumgartner, Lee, Birden, & Flowers, 2003; Forrest III & Peterson, 2006; Knowles, 1972). Pacific CHILD was framed around six core principles related to adult learning theory. The principles were (a) doing activities together, (b) using local school curricula and resources, (c) engaging in the language of reading, (d) helping each other work through difficult teaching situations, (e) talking with each other, and (f) using practices that fit their cultural contexts (Pacific Resources for Education and Learning, 2011). PREL staff utilized these six principles during the professional development activities, and in the learning of the instructional strategies, in order to more effectively enhance the adults' experiences.

The literature on professional development designs suggest features such as active learning, duration, reflection, and follow up are attributes of successful models (Desimone et al., 2002; Garet et al., 2001; Penuel, Fishman, Yamaguchi, & Gallagher, 2007; Wei, Darling-Hammond, Andree, Richardson, & Orphanos, 2009; Yoon et al., 2007). Many of these attributes were found in the Pacific CHILD program. Over the course of two years, teachers participated in job-embedded activities (see Table 1) (Pacific Resources for Education and Learning, 2007). These opportunities allowed teachers to work with their students and colleagues in a classroom

or school-based settings (Lyons & Pinnell, 2001; Wei, Darling-Hammond, & Adamson, 2010). An example from Pacific CHILD includes an annual summer institute for two weeks in each local context. During the first week, teachers learned about reading and instructional theories and strategies, then planned instructional lessons in their structured learning teams (i.e., professional learning community) for the following week. In the second week, PREL staff and teachers worked with fourth and fifth-grade students for part of the day. PREL staff demonstrated lessons (i.e., modeled lessons) while teachers observed. Teachers then delivered lessons with the same group of students while their peers and PREL staff observed. Each lesson targeted particular reading and instructional strategies (see Table 1). For instance, one day the lesson foci were on vocabulary and interactive task strategies. After each lesson, teachers worked in their structured learning teams, reflected upon the day's activities, and planned for the following day's tasks.

Table 1: Pacific CHILD professional development program

Pacific CHILD Program	
<b>Professional Development Activities</b> <ul style="list-style-type: none"> <li>• Annual Summer Institutes</li> <li>• Mini-institutes</li> <li>• Classroom observations (including pre/post conferences)</li> <li>• Lesson Demonstrations</li> <li>• Structured Learning Team</li> </ul>	<b>Instructional Program</b> <p><i>Reading Strategies</i></p> <ul style="list-style-type: none"> <li>• Question generation</li> <li>• Vocabulary</li> <li>• Text structure</li> </ul> <p><i>Instructional Strategies</i></p> <ul style="list-style-type: none"> <li>• Cognitively-rich environments</li> <li>• Differentiated instruction</li> <li>• Interactive tasks</li> </ul>

Source: Pacific Resources for Education and Learning, 2007.

Studies on effective professional development also recommend deepening teachers' knowledge and instructional practices by concentrating on particular aspects of a single content

area—as opposed to exposing teachers to a broad range of information (Desimone et al., 2002; Garet et al., 2001; Penuel et al., 2007; Yoon et al., 2007). PREL designed the instructional content the language arts block, and chose to supplement rather than replace existing reading programs with a focus on expository text (Abe et al, 2012). PREL had a reading advisory panel who recommended the content in the instructional program to reflect initiatives from different national and international projects, their expertise, and working knowledge of federal funds related to evidence from reading research. The instructional content emphasized three strategies that supported reading comprehension (i.e., question generation, text structure, vocabulary) and three pedagogical practices (i.e., cognitively-rich environments, differentiated instruction, interactive tasks). With guidance from PREL staff, teachers learned the theory and practice of these strategies using expository text during the various professional development activities (Abe et al., 2012). A quarterly scope and sequence was designed to concentrate on designated strategies and specific practices that could deepen teachers' understanding (Pacific Resources for Education and Learning, 2008). For instance, in one school quarter, teachers learned how to implement vocabulary strategies such as the Frayer Model or finding context clues through differentiated instruction. In another quarter, the emphasis was on teaching question generation through interactive tasks using practices such as reciprocal teaching.

### **Pacific CHILD Study Results**

According to Wei et al., (2009), effective professional development occurs when results show improvements in teachers' knowledge and practices, and in students' outcomes. The study results from Pacific CHILD suggest there was a statistically significant impact on student achievement, teacher knowledge, and teacher practice (Abe et al., 2012). Teachers and students who received the treatment intervention of Pacific CHILD outperformed their counterparts in the

control group, who had no exposure to the intervention (Abe et al., 2012). Student outcomes were measured using the reading comprehension scores from the Stanford Achievement Test 10 and the TerraNova. These scores were then compared with scores after students became 5<sup>th</sup> grade students (i.e., at the end of the two-year Pacific CHILD intervention) to assess outcomes.

The external evaluators, Berkeley Policy Associates, designed measures of teacher knowledge and practice (Abe et al., 2012). The teacher knowledge tool was a 40-item multiple-choice assessment with items about pedagogical knowledge of reading as well as the instructional needs of English language learners (ELL). Treatment teachers, on average, scored 27.0 points, and the control group, on average, scored 25.0. Thus, treatment teachers outperformed their counterparts in the control group, which was statistically significant. The teacher practice tool was modified based on the Sheltered Instruction Observation Protocol (SIOP) (Echevarria, Vogt, & Short, 2004, 2007). The modification included instructional practices found in the Pacific CHILD program. On this measure, treatment teachers also outperformed the control group at a statistically significant level (2.20 and 1.85 respectively).

The findings from Pacific CHILD raise important questions for those interested in professional development programs and teacher learning in the Western Pacific. First, the affordability (in terms of financial cost) of Pacific CHILD is unrealistic. PREL competed and was awarded a five-year contract worth 20.7 million dollars from the USDOE (United States Department of Education, 2006) to design and implement several major tasks according to the REL contract. With a fraction of these funds, they developed Pacific CHILD by utilizing research-based practices grounded in effective professional development designs. For instance, the amount of time that teachers spent in Pacific CHILD activities, and the duration of time (two years) are two important qualities. In Pacific CHILD, teachers on average, spent 105 hours in

professional development over the course of those two years. This amount of hours devoted to teacher learning is rare in other studies on professional development in education (Bierman et al., 2013; Garet et al., 2001; Yoon et al., 2007). Several studies suggest that teachers sustain their practices when professional development activities have been sustained over time and involve a large number of hours in training (Bierman et al., 2013; Garet et al., 2001; Yoon et al., 2007). However, the local educational agency (LEA), or external providers wanting to implement a quality professional development program in remote areas, must be aware that both a significant amount of funding and a sustained program are needed to support teachers over a period of time.

Secondly, implementing a quality professional development program involves many stakeholders. PREL is a large organization whose stakeholders fulfilled many responsibilities like securing funding sources, designing the professional development program, supporting teachers to implement the program, and evaluating the effectiveness of the program. Many LEAs have fewer staff members when compared to PREL. This means that LEAs would need to take into account the number of people with the requisite skill sets, who can assume responsibilities from the development to evaluation of professional development programs. In addition, several remote areas struggle with attaining some basic educational needs, such as inadequate number of classroom teachers (Heine & Emesiochl, 2007). Therefore, the resources needed for designing professional development programs may not be of a high enough priority for some LEAs to be able to implement and manage them.

Third, while the results suggest that teachers involved in Pacific CHILD improved their knowledge and practices, the quantitative data are not disaggregated at the “practice wisdom” level for practitioners and administrators to consume. “Practice wisdom” according to Nelson et al., (2009) is an approach in which researchers can improve the utility of research evidence so

practitioners can better understand what practices did and did not work in any research investigations, particularly those conducted in contextually relevant settings. Thus, research outcomes must be reported in a manner where those closest to making educational change (e.g., practitioners, administrators) can utilize findings that make sense in their settings. I suggest that the nature of PREL's findings were not as useful at the practical, school level.

In summary, PREL was able to secure funding and develop Pacific CHILD with results that show a significant statistical impact on teacher knowledge and student achievement. People involved benefited from this project. However, for similar professional development to continue in remote areas, inadequate funding and resources, both people and expertise, still pose significant barriers to this level of sustainable teacher learning.

### **Problem Statement**

Policy reforms and initiatives, funded by the USDOE, have garnered educational resources to address underserved populations in remote educational settings. Pacific CHILD is an excellent example of this kind of research and development work with teachers. How these projects impact teacher learning is an important phenomenon to more deeply understand. Effective professional development should produce change in teacher practices after the funding has stopped (Breault, 2007; Hargreaves & Fink, 2003; Odden, Archibald, Fermanich, & Gallagher, 2002). When the research funding of Pacific CHILD ceased in 2009, participants no longer received on-site support from PREL. The aim of this study was to understand how the professional development program impacted the participants' transfer of learning after Pacific CHILD's delivery.

Transfer of learning is a complex phenomenon in a teacher context. Although teachers are involved in many professional development programs, much of their learning does not make



its way into the classroom (Leberman et al., 2006; McDonald, 2011; Penner-Williams, Díaz, & Gonzales, 2017). Perkins & Salomon (1992) suggested, “looking at the conditions under which transfer does and does not occur and the mechanisms at work presents a more positive picture” (p. 9). As Lobato, Rhodehamel and Hohensee (2012) cautioned, there are other aspects of transfer of learning—such as the environment and the learner—that can be examined when outcomes fail. For instance, the literature suggest that more information is needed on how teachers’ motivation and attitude influence the transfer of learning process (Cheng, 2015; Leberman et al., 2006; Lightner et al., 2010; Perkins & Salomon, 1992, 2012). However, the educational landscape is frequently changing due to policy reforms at both the macro and micro level of education (Donnell & Gettinger, 2015; Nelson et al., 2009; Ravitch, 2013). Solely measuring motivation and attitude can be complicated. Therefore, another problem in understanding transfer of learning in a teacher context is examining the conditions of the environment that affect transfer of learning. Personal experiences, behaviors, and the environment influence how people make decisions (Bandura, 1978, 2004). As a result, two questions were posed for this research:

- What lessons can be learned regarding transfer of learning several years after the completion of a two-year reading professional development program in the Western Pacific?
- What factors in their environment, experiences, and behaviors do teachers report affect their transfer and integration of professional development strategies and concepts several years after the program’s completion?

### **Significance of the Study**

In remote settings, such as the context of this study, results from these questions can offer insights into the lived experiences of a community of teachers through a transfer of learning framework. Transfer of learning has similar attributes as effective professional development models. Both include opportunities for teachers to connect existing and new knowledge, and to reflect on their practices as a way to deepen their understanding and refine their skills. In addition, there is a limited body of educational research in the Western Pacific, in particular on professional development (Leberman et al., 2006; McDonald, 2012a). The results of this study have the potential to assist teachers, professional developers, administrators, policymakers, and others with understanding the factors that may affect teachers' transfer of learning, even long after the professional development activities have ceased. In addition, these results have the potential to provide a deeper understanding about the impact of externally delivered educational practices in similar communities in order to sustain teacher learning. Finally, it is my hope that this study will validate the work of dedicated practitioners in the Pacific who, as participants in this study, were always open and eager to learn ways to help their students succeed.

### **Methodology**

Phenomenology is an approach to understanding human experience with the world from one person's point of view (Bolton, 1979; Burnette, Sanders, Butcher, & Salois, 2011; Sloan & Bowe, 2014). A significant term used in phenomenology is called the *lived experience*, or a person's life event and how it is transformed into consciousness (Merriam, 2009; Moustakas, 1994; Sloan & Bowe, 2014). I employed Moustakas' (1994) phenomenological research design to delve further into the *lived experience* of the teacher participants, in this case regarding their ability to transfer any learning *after* being involved with Pacific CHILD. In this examination, I

implemented methods such as surveys, interviews, and focus groups to “gather data to build concepts, hypotheses or theories” (Merriam, 2009, p. 15). While other qualitative methods (e.g., grounded theory, case study) were taken into consideration, understanding and describing participants lived experience were essential. Therefore, phenomenology was the most appropriate approach to capture the participants’ experiences.

### **Conclusion**

In summary, I have presented the background, rationale and questions developed to examine the transfer of learning practices of teachers who participated in Pacific CHILD from Veritas Island, an island community in the Western Pacific. A phenomenological research design was implemented to gain insights on lessons learned about the transfer of learning process and factors affecting transfer. I argue that participants’ stories, through a phenomenological research framework, have the potential to offer additional insight into the impact of professional development programs in remote settings, for both external educational agencies and the communities themselves, in order to support continued professional growth for teachers that is locally sustainable.

Next, I present a definition of terms to end this first chapter.

## Definition of Terms

<u>Word</u>	<u>Definition</u>
Bridging	Bridging refers to the motivational factors that set the conditions for transfer based on the concepts of “detect, elect, and connect” in transfer of learning. “Detect, elect, and connect” are ways in which the learner decides if previous knowledge should be transferred to the current context (Perkins & Salomon, 1988, 1992, 2012).
Essence	The structure of the experience (van Manen, 1990)
Lived experience	A person’s life event and how it is transformed into consciousness (Merriam, 2009; Moustakas, 1994; Sloan & Bowe, 2014).
Pacific CHILD	A professional development program in reading developed by the Pacific Resources for Education and Learning (PREL) staff (Abe et al., 2012). Pacific CHILD was used as an intervention in a randomized control trial study that was conducted in American Samoa, the Commonwealth of the Northern Mariana Islands and Hawaii. It is the background for this study.
Phenomenology	A research design used to understand a person’s lived experience through a systematic process (Moustakas, 1994)
Professional development	“Those processes and activities designed to enhance the professional knowledge, skills, and attitudes of educators so that they might, in turn, improve the learning of students” (Guskey, 2000, p. 16).
Teacher efficacy	The beliefs and capabilities that teachers hold about themselves and their teaching (Guskey, 2009; Kleinsasser, 2014; Pendergast, Garvis, & Keogh, 2011; Tschannen-Moran & Hoy, 2001).
Transfer of learning	The learned knowledge and skills from one context that is later applied in another context (Gick & Holyoak, 1980; National Science Foundation, 2002; Perkins & Salomon, 1992; Thomas, 2010).

## **Chapter 2**

### **LITERATURE REVIEW**

This dissertation examines the professional decisions and practices related to transfer of learning from a cohort of teachers after they had participated in a reading professional development program, Pacific CHILD. These participants no longer received on-site support, and made decisions independently on how Pacific CHILD would influence their professional lives. Too often researchers stop at the evaluation aspect of professional development programs, and devote minimal time to investigating the longer-term impact on teachers (Ford, 1994; McDonald, 2011). Some find that professional development is critical, but considered a poor investment on return (Hill et al., 2013; The New Teacher Project, 2015; Whitehead, 2010). Therefore, there is a need to examine what and how teachers transfer their learning from these programs into their contexts to better understand how to sustain local efforts (Borko, 2004; Cheng, 2015; McDonald, 2011).

This chapter will present relevant literature involving transfer of learning through a thematic approach. The themes are: (a) transfer of learning—why is it important? (b) transfer of learning—a historical overview, (c) transfer of learning and triadic reciprocal determination, (d) transfer of learning in a professional development context, and (e) transfer of learning in remote areas.

#### **Transfer of Learning**

Researchers who have studied transfer of learning share a similar conceptual definition. Gick and Holyoak (1987) explained, “Transfer is a phenomenon involving change in the performance of a task as a result of the prior performance of a different task” (p. 10). Perkins and Salomon (1992) describe, “Transfer of learning occurs when learning in one context or with

one set of materials impacts on performance in another context or with other related materials” (p. 3). Thomas (2010) defined transfer as “the ability to appropriately apply information and skills learned in one setting to a similar or different setting” (p. 5). The commonalities among these researchers include the elements of the learner, the environment, the training, and the transfer task. For the purposes of this study, transfer of learning is defined as *the learned knowledge and skills from one context that is later applied in another context* (Gick & Holyoak, 1980; National Science Foundation, 2002; Perkins & Salomon, 1992; Thomas, 2010).

### **Transfer of Learning—Why is it Important?**

At all levels of education, teachers expect their students to gain knowledge during particular moments with hopes they can demonstrate their understanding in future work. Haskell (2001) studied the transfer of learning for more than twenty years, arguing that the only way we learn about history is through the transfer process. According to Haskell, failure and prior knowledge are two significant attributes in transfer of learning. He contended that failure of transfer often leads to discoveries and solutions. Failure can assist in the development of critical thinking skills, such as making analogies, and reasoning during teaching and learning across and within subject matter areas. Secondly, “we constantly transfer our previous learning and experience to more quickly and efficiently learn a new skill” (Haskell, 2001, p. 24). To do this, we reduce our knowledge into smaller manageable portions as a way to feel less overwhelmed with an abundance of information.

Several researchers indicated that transfer is the central goal for teaching tasks and school innovation (Bransford, Brown, & Cocking, 2000; Dewitz & Graves, 2014; Dreer, Dietrich, & Kracke, 2017; Haskell, 2001; Perkins & Salomon, 1988). Not only is transferring essential for teachers’ professional growth, it is also central to students’ success. In the current educational

climate where reform professional development models are prevalent, teachers are expected to be proficient in subject matter knowledge, and to have effective pedagogical skills (Borko & Putnam, 1995; Hill et al., 2013). There is an assumption that teachers can learn new content and skills immediately and then demonstrate these practices in the classroom. Dewitz & Graves (2014) explained that transfer is necessary because teachers are “increasingly asked to monitor students’ progress, and thus they need to know how to design or select assessments that demonstrate transfer, not just initial learning” (p. 150). For teachers to design assessments, they must have proficient knowledge of the content. In order for transfer to take place, a substantial amount of learning must occur in the initial situation (Baldwin & Ford, 1988; Bransford et al., 2000; Perkins & Salomon, 2012). The learner must demonstrate his or her knowledge of the subject matter, concepts, facts, and procedures within a discipline (Borko & Putnam, 1995). Perkins and Salomon (2012) claimed that consumers of knowledge have difficulty with applying this information at a later time. Therefore, identifying effective practices that promote transfer is useful. These practices include (a) learners having a substantial amount of time to acquire knowledge, (b) opportunities for practice, (c) feedback on their application of performance, (d) clear expectations on how learning should be applied in the future, (e) mastery of the topic, and (f) enhanced development of skills (Baldwin & Ford, 1988; Bransford et al., 2000; Haskell, 2001; Leberman, McDonald, & Doyle, 2006; Perkins & Salomon, 1992).

Others argue that the effective transfer practices do not necessarily guarantee that transfer will occur. Other potential factors have yet to be explored (Darling-Hammond, 2010; Garet et al., 2001; Klingner et al., 1999; Marini & Genereux, 1995). For example, Garet et al. (2001) explained that when fewer people are involved in activities, the potential rate of transfer is minimal. In their work on professional development programs, they found that transfer of

learning would more likely occur when there was collective participation by many colleagues in the same school, department, or grade level. When more people are involved in the process, they were more likely to establish a local support system as a tool to continue their professional journey.

### **Transfer of Learning—A Historical Perspective**

The theory of transfer of learning has been studied for many years in the areas of cognitive psychology and education. This historical perspective is intended to provide an overview of how transfer investigations have evolved over the years.

Transfer of learning started with replications of procedures with an emphasis on outcome measures. Two significant studies set the foundation for transfer of learning. First, Thorndike's study on identical elements is credited as the earliest known work on transfer of learning (Bransford & Schwartz, 1999; Gick & Holyoak, 1987; Haskell, 2001; Perkins & Salomon, 1992). Thorndike believed that an identical set of concrete elements (e.g., procedures) was needed for transfer to occur (Bransford & Schwartz, 1999; Thorndike, 1901). His assumption was that participants who were given a set of procedures would outperform those who did not. The intervention consisted of using pretest data on mathematical estimation to guide specific feedback as a way to improve participants' learning. Later, they completed a post-test on the same concept of estimation with shapes. The results suggested those who had received instruction had improved more than their counterparts who did not receive any instruction. As a result, Thorndike theorized that an identical set of concrete elements was needed to be present for transfer to occur (Bransford & Schwartz, 1999; Gick & Holyoak, 1987; Haskell, 2001; Perkins & Salomon, 1992).



Charles Judd conducted the next study as a direct challenge to the “identical elements theory” (Bransford & Schwartz, 1999; Haskell, 2001). The “general principle theory” according to Judd, indicates that subjects are able to conceptualize problems to demonstrate their learning as opposed to recalling rote procedures (Bransford & Schwartz, 1999; Haskell, 2001). Judd’s experiment involved two groups of boys who were taught how to throw darts underwater. The experimental group received information on the concept of refraction and how water refracted light while the control group did not (Bransford & Schwartz, 1999; Haskell, 2001). The experimental group outperformed the control group. Judd’s contribution showed that transfer could happen if learners gained conceptual understanding “without mimicking a set of procedures” (Bransford & Schwartz, 1999, p. 99). These two studies established the groundwork for future research on the transfer of learning. Their emphasis on replicating procedures and targeting expected outcomes paved the way for investigations on the process approach to transfer of learning.

Many believed there was more to transfer of learning than rote memorizations and identical elements (Baldwin & Ford, 1988; Bransford & Schwartz, 1999; Engle, 2012b; Ford, 1994; Perkins & Salomon, 1992). According to Ford (1994), “transfer is not static” (p. 22). He explained learners need more opportunities to use their new learning in different ways for transfer to occur. With that in mind, new directions of transfer of learning emerged in topics related to the process, the situation, and the learner.

**The process.** In 1988, Baldwin and Ford’s analysis of existing literature suggested that in order “for transfer to have occurred, learned behavior must be generalized to the job context and maintained over a period of time on the job” (p. 63). They recommended framing transfer of learning around a training model consisting of an input-process-output. The input variables

consisted of trainee characteristics (e.g., ability, personality, motivation), training design (e.g., principles of learning, sequencing, training content), and work environment (e.g., support, opportunity to use). The process variables were comprised of learning and retention. The output variables included the learners' ability to generalize the concepts and maintain the practices. These researchers (at the time) ascertained that one of the biggest gaps within transfer-related practices was the lack of appropriate measures to determine how the learners were able to generalize and maintain their knowledge and skills in the transfer context.

**The situation.** Within a few decades, the transfer of learning literature had broadened or as Engle (2012a) claimed, there was a resurgence of transfer research that looked beyond study outcomes. Particularly, she noted that the knowledge base of transfer had expanded into four areas: (a) looking beyond principles and procedures, and taking a closer look at representation and other forms of activity, (b) exploring how to examine unanticipated ways in which prior learning is applied, (c) determining how prior learning affects future learning, and (d) figuring out how transfer assists with the learners' ability to reconstruct knowledge, skills, and identity into creating something new or becoming someone new.

Another perspective related to the conditions of a situation is called near and far transfer (Foley & Kaiser, 2013; Larsen-Freeman, 2013; Perkins & Salomon, 1992). Near transfer refers to the similarities between the original learning situation and the new one. In near transfer, the learner uses minimal cognitive effort. Far transfer refers to the dissimilarities between the original and new learning situation (Foley & Kaiser, 2013; Larsen-Freeman, 2013, Haskell, 2001; Perkins & Salomon, 1992). In this situation, the learner uses analogical reasoning and more cognitive effort to demonstrate their understanding (Larsen-Freeman, 2013). According to Dewitz & Graves (2014), there is no clear divide between near and far transfer. Rather the goal

is for learners to understand that knowledge can be transferred in other situations. For instance, teachers can take a reading strategy they had learned from a professional development activity and then modify and apply it with students who are reading at different text levels.

**The learner.** In contemporary studies of transfer of learning, there is a growing body of evidence to expand the conceptual understanding of transfer from the learners' perspective. One aspect involves the learners' interaction with information in the environment. Lobato, Rhodehamel, and Hohensee (2012) coined the term *noticing* as a way to explain how an individual consumes competing sources of information in the social learning environment during the transfer process. Another examination comes from the learners' skill set in making connections. Engle, Lam, Meyer, & Nix (2012b) theorized that an *expansive framing* approach facilitates learning across multiple contexts and content areas. Expansive framing, they claimed, creates links for individuals to see the meaningfulness and practicality from the prior learning as tools to develop generalizations in other potential transfer environments.

Another view to examine transfer is from a motivation and attitude perspective. According to Perkins and Salomon (1988, 1992, 2012), *bridging* is a transfer concept that seeks to understand the learners' motivation and dispositions that set the conditions for transfer. Bridging involves the learner's cognitive and affective efforts in recognizing and connecting to the potential of new learning. There are three aspects of bridging: detect, elect, and connect. Detect refers to the learner's ability to recognize that a link from previous learning to new learning can be made. Elect refers to the learner's exploration or pursuit of new learning. Connect refers to the learner transferring the learning between familiar and new concepts. Similarly to other researchers, Perkins and Salomon (2012) emphasized the initial learning is

what will propel learners in making decisions about how to transfer their learning and how far they would like to deepen their knowledge.

In summary, this historical perspective of transfer of learning cleared the pathway for future work. Early investigations emphasized the importance of procedures and replications of tasks to gain insights on outcomes as a result of transfer. Over time, these historical views shifted toward a process approach, and researchers eventually explored other aspects of transfer such as the environment and the learner. Even though the focus of transfer of learning shifted, the commonality among these historical accounts is rooted in the relationship between the initial and future learning. In this study, I identify the initial learning as occurring from the participants' involvement in Pacific CHILD and their future learning as occurring *after* Pacific CHILD had ended.

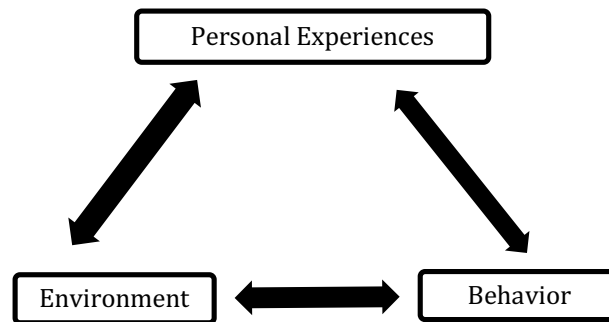
In the next section, I turn my attention to transfer of learning in relationship to the triadic reciprocal determination model. This model assisted with better understanding the cognitive, environmental, and social factors affecting teachers' decision-making processes regarding their transfer of learning.

### **Transfer of Learning and Triadic Reciprocal Determination**

Social cognitive theory is rooted in the belief that learning is a combination of cognitive capabilities and interactive factors (Bandura, 1978, 1989, 2004). In this study, I focus specifically on the triadic reciprocal determination aspect of the social cognitive theory. Bandura, (1978, 1983, 1989, 2004) explained in triadic reciprocal determination, people's decisions are influenced by personal experiences, the environment, and behavior (see figure 1). These influences are not of equal strength, but rather "interlocking determinants will vary for different

activities, different individuals, and different circumstances...[and] what people think, believe, and feel affects how they behave” (Bandura, 2004, p. 27).

Figure 1: Triadic reciprocal determination



Source: Bandura, (1978, 1983, 1986, 1989)

In my search through the literature, I found that triadic reciprocal determination has been influential in conceptualizing how transfer of learning occurs in an educational setting. Most people who use the triadic reciprocal determination model may not examine how personal experiences, behavior, and the environment interact independently; instead, they tend to look at the interrelationships between two influences and how it affects the third variable (Bandura, 1978, 1983, 1986, 1989). Bandura claimed that examining the interactions would lead to better understanding of all three influences. For this study, I explored the literature on different aspects of transfer of learning from a professional development context, multiple perspectives, and remote areas. Within these three themes, I saw potential interactions among the environment, personal experiences, and behavior that would deepen my understanding of transfer of learning.

## **Transfer of Learning in a Professional Development Context**

When it comes to the topic of teacher learning, research indicated that transfer of learning is a complex phenomenon (Antoniou & Kyriakides, 2013; Haskell, 2001; Leberman et al., 2006; McDonald, 2012b). Professional development is intended to improve the knowledge and practices of educators (Desimone et al., 2002; Garet et al., 2001; Guskey, 2000; Timperley & Wiseman, 2003). However, what teachers learn in professional development does not necessarily make its way into the classroom. To improve the transfer of learning process, a closer examination of professional development program designs and the ways in which researchers conduct follow up studies are needed. Currently, thousands of dollars are spent on professional development programs (Fermanich, 2002; The New Teacher Project, 2015); yet there are few researchers who have returned to their studies and determined if any of their work had lasting effects (Leberman et al., 2006; Timperley & Wiseman, 2003; Whitehead, 2010). By understanding professional development, program design, how researchers document the transfer process after the activities, and what factors affect educators during the transfer process, the educational community can be better informed.

**Defining professional development.** Professional development has been an integral component in creating change in educational systems. According to Guskey (2000), professional development is ongoing, intentional, and systemic. It is a deliberate process with clear purposes and attainable goals. The term professional development is often defined with three attributes: teachers, learning activities, and increased understanding. For instance, in the *No Child Left Behind Act of 2001*, professional development is summarized as activities to improve and increase teacher knowledge of academic subject areas that they teach, advance their understanding of effective instructional strategies, and offer high-quality, sustained, and

classroom-focused instruction (United States Department of Education, 2005b). Wei et al., (2009) defined professional development as “that which results in improvements in teachers’ knowledge and instructional practice, as well as improved student learning outcomes” (p. 3). Most recently, the *Every Student Succeeds Act 2015* definition of professional development has been summarized as activities that, as an integral part of educational agencies, are sustained to improve and increase a) teachers’ knowledge of academic subjects they teach, and b) their understanding of how students learn (United States Department of Education, 2017). In this study, I define the term professional development as “those processes and activities designed to enhance the professional knowledge, skills, and attitudes of educators so that they might, in turn, improve the learning of students” (Guskey, 2000, p. 16). Professional development is integral to the transfer of learning process, because it is often the initial learning situation where teachers obtain knowledge before implementation in the classroom.

In most areas of the U.S., teachers are required to continue their professional growth in ways often set forth by state teacher licensing boards (de Vries, Jansen, & Van De Grift, 2013; Wei et al., 2009). This may include the amount of time teachers participate in various activities (e.g., workshops, training, professional learning communities) and/or attainment of advanced college degrees or licensure renewal. For instance, teachers in the Hawaii Department of Education must submit evidence of their involvement in professional development activities or academic courses to renew their teaching license (Hawaii Teachers Standards Board, 2015). Licensing is only one type of documentation of professional growth.

In recent years, there has been an increase of professional development studies as a result of more emphasis on standards-based reforms, mandated legislation, the application of scientific-based research, and teacher accountability (Dede, Ketelhut, Whitehouse, Breit, & McCloskey,

2009; Garet et al., 2001; Gulamhussein, 2013; Yoon et al., 2007). This greater attention has expanded how researchers have examined the impact of professional development on schools, teachers, and students. However, some contend that despite well-intended goals to improve education, professional development efforts often result in a poor investment on return (Hill et al., 2013; The New Teacher Project, 2015; Whitehead, 2010). These poor investments are often attributed to elements of professional development design and adult learning practices.

As a result, the link between professional development and transfer of learning often go unnoticed. Most professional development studies tend to measure outcomes related to current work with teachers (Guskey, 1988), the application of specific strategies or content knowledge (McGill-Franzen, Allington, Yokoi, & Brooks, 1999), or student outcomes (Abe et al., 2012; McGill-Franzen et al., 1999). This is not to argue those studies are not valuable. Quite the contrary: these studies provide insights into the learner and the learning situation. More precisely, McDonald and Melchior (2008) described professional development as examining “how” teachers learn, and described transfer of learning is determining “what” they had learned. Basically, professional development and transfer of learning are related concepts but differ in intent (McDonald & Melchior, 2008). The following section describes professional development designs.

**Professional development designs.** There is a general agreement that high-quality professional development is important for teacher change. However, one of the complexities in professional development studies is that not all programs are similar, making it difficult to determine program effectiveness (Koellner & Jacobs, 2015; Wei et al., 2009). For instance, some researchers turned their attention to studying the design or the structure and features of how the professional development program is operationalized (Garet et al., 2001; Joyce &



Showers, 1983; Penuel et al., 2007). Others have investigated specific content areas or strategies within program design (Gersten et al., 2010; Klingner et al., 1999; McGill-Franzen et al., 1999).

Researchers who study professional development design have indicated that effective models include core features that have a positive influence on teacher learning (Boyle, Lamprianou, & Boyle, 2005; Garet et al., 2001; Wei et al., 2009; Yoon et al., 2007). Some of these core features include focused content, duration, and coherence. Garet et al. (2001) conducted one of the most frequently cited studies of effective professional development design. Investigating over 1,000 math and science teachers, the researchers examined the relationship of features in professional development and self-reported changes in teachers' knowledge, skills, and teaching practices. Their results suggested that effective designs include structural components and core features. Structural components relate to the activities such as the form (e.g., study group, network), duration (i.e., the length over time, amount of contact hours), and collective participation (i.e., the types of groups involved such as grade level, department, whole school). Core features refer to the conceptualization of the activities such as having a content focus (i.e., a subject or topic intended to deepen teachers' knowledge), active learning (i.e., the opportunities given for teachers to learn content), and coherence (i.e., how the professional development is aligned to existing school efforts and teachers' goals).

Garet and colleagues' (2001) study also had many implications for future directions. First, it laid the foundation for others to design and assess specific areas of professional development programs. They found that duration has a significant impact on teacher learning, since teachers were able to learn and grow over time. However, they also found that designs with a longer duration would significantly increase the financial cost. Thus, some schools would not be able to replicate these models unless additional funding was provided. Secondly, they

found that a single content focus (e.g., math or science) for teachers to learn, combined with active learning that was aligned with school efforts, would most likely improve teachers' knowledge and skills. The coherence of these features would support change because of the connections teachers can link to inside and outside of the classroom. Finally, they also suggested that reform models of professional development tended to produce better outcomes because their duration was longer. However, when they compared traditional and reform models with similar duration, there were no significant differences in teacher outcomes. Therefore, the researchers suggested that duration is critical to improving professional development programs. The delivery of the professional development design is equally important, which is the next part of this review.

**Teacher-imposed programs.** An external funding source often influences teacher-imposed programs. Some researchers claimed that external funding sources often focus on their needs as opposed to the needs of the schools (Afamasaga, Miere, Pene, Karuo'o, & Drova, 2007; Koellner & Jacobs, 2017; Leberman, et al., 2006; McDonald, 2012; Puamau, 2007). While the sources' intentions are to support teachers, this results in teachers "exert[ing] relatively little control over professional development" (Sykes, p. 465). Teacher-imposed programs may be called reform models where significant shifts are demanded, but that entails the assumption that change is needed (Borko & Putnam, 2009; Breault, 2007; Leberman et al., 2006). Often that assumption arises because an alleged deficiency exists in teachers, or the school, or sometimes both. The problem is that influence over the direction of change is exerted from funding sources or policies that lack longevity (Breault, 2007; Hill et al., 2013; Leberman et al., 2006). And with that, change on a constant basis often becomes a deterrent for the school or teachers to improve (Hill et al., 2013; Kragler, Martin, & Kroeger, 2008;). For example, with each new president

have come shifts in federal initiatives to improve public education. What makes this problematic is that policy changes happen every 4 to 8 years. With each type of reform, teachers are expected to teach in new ways that perhaps are quite different from when they were taught (Borko & Putnam, 1995). Darling-Hammond and McLaughlin (2011) expressed that educational initiatives alone cannot be successful if policies do not support coherent student and teacher learning. Moreover, these imposed programs often disregard local institutional knowledge or coherency, and commonly do not adhere to effective research-based practices in professional development design. These programs may contain some beneficial features, but they are not substantial enough to sustain teachers' learning or have teacher buy-in from the outset.

Coherence involves the integration of new professional development efforts with existing initiatives to maximize efforts (Garet et al., 2001). Professional development programs funded by the federal government are clear examples that lack coherence in design. Policy makers have relied on commissioned reports, regardless of their flaws and criticism, to adopt policies and incentivize funding for local and state educational agencies to improve their school systems (Borko 2004; Ravitch, 2010, 2013; Sykes, 1996). One such example is the *Reading First* initiative, where state educational agencies received grant money on the condition that teachers implement mandated curriculum, instructional practices, and assessment (Gamse, Jacob, Horst, Boulay, & Unlu, 2008). The results suggested that despite an increase of instructional time on reading, student achievement scores were significantly improved in decoding but not in comprehension (Gamse et al., 2008). One of the problems is that *Reading First* targeted students in lower elementary grades, which excluded struggling readers in upper elementary from participating in the program. As a result, improving students' reading proficiencies at a school-wide level was difficult to achieve because it lacked program coherence.

**Teacher-centered programs.** Teacher-centered programs focus on the needs of the teachers as opposed to the needs of the professional development program. In teacher-centered programs, the designs are often based on teachers' needs and input on how they would like to grow professionally (Twomey, 2010). Koellner and Jacobs (2015) argued that an effective professional development design should focus more on the teachers using a structure that responds to their learning needs. They advocated for an adaptive model, where the structure is based on a continuum ranging from highly-specified to highly-adaptive to meet teachers' needs. Specified models, they suggested, involve all teachers learning the same content at the same time, and with the intent of attaining the same goals. They argued that teachers have different levels of knowledge and should not be required to participate in sessions that do not expand their learning. They prefer the adaptive model design, where teachers are offered a variety of learning activities, and given opportunities to set goals and outcomes based on their knowledge level. They asserted that locally-constructed models can evolve over time, be easily modified, and include descriptive practices to fit the context. An example of a teacher-centered design is an approach called lesson study (Lewis, Perry, Foster, Hurd, & Fisher, 2011; Lewis, Perry, & Hurd, 2004). In a lesson study, grade-level teams plan lessons based on targeted goals and students' needs. They then implement the lesson while their colleagues observe. After the lesson, the grade-level colleagues debrief their observation and discuss the students' progress. Through the observation and debrief process, teachers reflect and then revise the lesson for the next colleague who will implement the lesson.

A current issue with professional development is that teacher-centered models can be masked as a teacher-imposed model, such as the one in this investigation. Both teacher-centered and teacher-imposed programs can include design features such as focused content, active

learning, and different forms of delivery. However, mandated participation and duration are two elements that can distinguish these programs. First, teacher-imposed programs often mandate participation whereas teacher-centered programs do not. Secondly, the duration of teacher-imposed programs tended to be longer due to substantial funding. Therefore, teacher-imposed programs have more active learning opportunities that stretch over a time span that may change teaching behaviors (Desimone et al., 2002; Garet et al., 2001). For some teachers, their instructional behaviors change before their attitude and beliefs (Guskey, 1986; Richardson, 1994; Timperley & Phillips, 2003). These teachers need to see results first before believing in a practice. This dispositional shift is where transfer of learning and professional development intersected. Existing literature indicates attitude is one predictor of transfer occurrence (Cheng, 2015; Leberman et al., 2006; Lightner et al., 2010). That is to say, when teachers believe that their professional involvement has relevance to their growth and classroom setting, they are more likely to transfer their efforts. However, transfer of learning in a professional development context may vary, as described in the next section.

### **Multiple Perspectives of Transfer of Learning**

Thomas (2010) explained, “transfer of learning takes on different meaning depending on the way it is defined and applied before, during, and after the learning experience” (p. 4). In teacher-learning contexts, multiple perspectives of transfer of learning are found under the guise of follow-up, sustainability, and transfer of training. These different referents can create ambiguity in work on teacher learning. For instance, duration and time are influential factors in the transfer process (Bransford & Schwartz, 1999; Haskell, 2001; McDonald & Melchior, 2008). However, when teachers acquire new information from professional activities, varying lengths of time are needed for them “to think in new ways about students, subject matter, and the teaching-

learning process” (Borko & Putnam, 1995, p. 38). This fast speed of learning can be problematic in an educational accountability system, where results from teachers’ instruction are expected to make an immediate impact on student achievement. Several studies illustrate the inconsistencies in how these studies are referenced, and how much time is needed between studies to collect information about transfer of learning.

In one example, Bierman et al.’s (2013) follow-up study occurred one year after preschool teachers’ involvement in a professional development activity centered on the Research-based Developmentally Informed (REDI) curriculum to enhance teacher quality. They emphasized the implementation of the curriculum as one method of improving teacher quality in the areas of social-emotional development, pedagogical strategies, and language and emergent literacy skills in preschool settings. The initial learning was a training session held in the summer before implementation during the following school year. Later, throughout the academic year, teachers had weekly visits by a REDI coach. This study contributed to the existing body of knowledge in several ways. First, these researchers found participants who had high levels of delivering instruction using the REDI intervention were more likely to sustain their practices afterward when compared to teachers with low levels of implementation. Second, when teachers received support with implementing evidence-based curriculum, the quality of teaching was improved. Third, they identified the gaps in the existing curriculum (e.g., social-emotional learning) decreased because teachers now had access to readily available materials. Finally, the researchers indicated that one of the limitations of their study is the act of capturing teachers’ initial transition just one year after their involvement. They questioned whether the follow-up study was too soon for other variables that could affect teachers’ follow-up efforts. The lack of time may account for the teachers’ transfer to not fully evolve. Bierman and

colleagues suggested just such a time frame; to wait three years after the professional development program had ended before studying transfer of learning impact.

Another perspective of transfer and time need to show results was found in Klingner et al. (1999). These researchers referred to their investigation as ‘sustaining,’ and waited three years to conduct their study. Their study focused on the factors and barriers that supported the continued implementation of literacy strategies in special education classrooms. They found all teachers continued their use of strategies, albeit at varying levels of frequency and quality. Some conditions that facilitated sustained implementation were having supportive administrators and colleagues and teachers being able to modify a strategy. Barriers identified were excessive time allocated for high-stakes achievement, a mismatch between teaching style and practice, and not having an in-depth understanding from the outset. Klingner et al., also found that teachers who possessed a moderate level of implementation during the training were likely to sustain their practice. The findings suggested that even after three years, most of their teachers continued their strategy use.

In a different example, Cheng’s (2015) empirical study tested a model that could potentially explain factors affecting teachers’ learning—from an in-service training to the environment of their workplace. However, Cheng’s study did not reveal the duration or time in between the training and his subsequent research. His investigation focused on the transfer maintenance and transfer intention. Transfer maintenance was defined as behaviors learned from a training that persisted over time. Transfer intention was the belief that a person would perform a particular behavior. The results from this quantitative study indicated that teachers were more willing to maintain transfer if the information was related to their jobs and if they had practice during the training. Also, the researchers suggested that attitude was a significant predictor of

transfer maintenance. When teachers believe the training would help their performance, they were more willing to continue their application in the classroom. Because this study did not identify time from one learning situation to the next, these results are advantageous towards identifying important teachers' behaviors during the transfer of learning process; however, they are disadvantageous in determining whether these actions were displayed immediately or over time.

In summary, these studies represent transfer of learning through the use of synonymous terms such as follow-up, sustainability, and transfer of training. Though other terms were utilized, the frameworks of their investigations were conceptually similar where an examination of teachers' previous learning experience is compared to a future experience. The ambiguity in these studies relates to time and duration. There were no clear indicators of how much time researchers should wait before conducting initial and subsequent studies. However, the results showed that some teachers were able to transfer their learning at varying levels and at different intervals of data collection. What remains unclear is at what point in time do teachers stop transferring their previous learning? Underlying this stoppage of learning is an assumption that professional development programs are ineffective. As Ford (1994) explained, "the point in time at which changes in behavior are measured can have a major impact on the conclusions drawn about whether transfer has occurred" (p. 23).

In addition to time, professional learning and environment were revealed as two broader categories of transfer of learning. Studies in these areas indicated variables (e.g., time, disposition, referent to study) were situational and transfer behaviors do not come automatically. These contributions are important to the current study. I collected data six years after the fact. Because this amount of time had elapsed from the original learning, the number of contextual



variables each teacher encountered was most likely larger than the studies mentioned in this section. Perkins and Salomon (2012) asserted that it “is not *whether* significant transfer of learning can occur but *under what conditions of learning*.” This will be discussed in the following section.

### **Factors Affecting Transfer of Learning**

Classroom settings are a dynamic place for learning. When teachers leave professional development activities, they are often expected to operationalize their practices in the classroom (Klingner et al., 1999; Murrill et al., 2013; Perkins & Salomon, 1988; Thomas, 2007). Genereux & Marini (1995) explained that even if teachers have acquired the necessary knowledge and skills to transfer their learning, transfer would not occur if they do not know how to access these resources, or cannot see the relevance of their previous learning with the current situation. Several studies indicated some teachers did not take advantage of utilizing innovative practices with their students. Environmental and personal experiences influence transfer from one situation to another (Antoniou & Kyriakides, 2013; Cheng, 2015; Klingner et al., 1999; Murrill et al., 2013; Pomerantz & Condie, 2017).

**Environmental conditions.** After professional development activities teachers are expected to operationalize what they learned into their context (e.g., the classroom) and with their students. The environmental conditions and barriers that impact transfer of learning are relevance to the classroom setting, supportive network (Antoniou & Kyriakides, 2013; Cheng, 2015; Klingner et al., 1999; McDonald & Melchior, 2008; Murrill et al., 2013), and external pressures (Klingner et al., 1999; Murrill et al., 2013).

Klingner et al.’s, (1999) mixed-method study provided a practitioner’s perspective of the environmental conditions and barriers influencing transfer. In their study with special-education

teachers, they found several factors that facilitated teachers' transfer of literacy strategies as well as some barriers. First, they identified a comprehensive supportive network that included administrative backing, conversations with colleagues, and the implementation of the program as a school-wide effort. Teachers in the study commented that the ongoing conversations with colleagues and the principal about their continued use of the literacy strategies made their work feel important and of high-value.

Another condition that facilitated the transfer was related to the students. When participants saw students benefitting from the strategy or being able to utilize the strategy effectively, teachers were more likely to continue using the strategy. Teachers also expressed that being able to modify or adapt the strategy was critical to meet their students' needs. The third factor reported was the teachers' accessibility to prepared materials or resources. During the professional development program, the external consultants provided all the materials needed for teachers to implement the strategies. These resources assisted teachers in getting started with the implementation. Once the external provider had stopped on-site support, the resource teachers and paraprofessionals at their school continued with supplying the needed materials. Perkins and Salomon (1992) explained that materials from previous experiences could serve as an analogy by connecting old and new knowledge. When participants use older resources in modified ways, they tend to deepen their knowledge on recently learned content.

Environmental barriers refer to the challenges that prohibit or impede the transfer of learning process. When teachers have options and are allowed to make professional decisions within their environment, they are more likely to exercise their instructional freedom (as opposed to those who are in a confined environment). Some environmental variables that are often out of teachers' control include a heavy emphasis on curriculum implementation (Klingner et al., 1999;

Pomerantz & Condie, 2017), external pressures (Klingner et al., 1999; Murrill et al., 2013), lack of time for planning and implementation (Klingner et al., 1999; Leberman et al., 2006; McDonald, 2011; Murrill et al., 2013), and a disconnect between the professional development program and the classroom setting (Cheng, 2015; Garet et al, 2001; Klingner et al., 1999; Murrill et al., 2013; Perkins & Salomon, 2017).

In addition, teachers should not only think of a supporting environment in their school but also about the environment for colleagues from other campuses (Antoniou & Kyriakides, 2013; Murrill et al., 2013). Murrill et al., (2013) investigated an annual summer professional development program for teachers within one school district. The program had been in existence for fourteen years, and about forty percent of teachers were returning veterans. The purpose of their study was to examine the characteristics of the professional development settings. Their summer training was referred to as the “place for learning” that could be the impetus that led to transfer into teachers’ classrooms, or the “place of practice”.

Participants in Murrill et al.’s (2013) study reported the *place of learning* as a positive experience. They were able to gain knowledge and reflect on their practices by collaborating with others. At the end of the summer training, teachers self-reported on an exit survey that their professional knowledge had increased. During the school year, however, participants worked at various schools in the district, and direct on-site support was not provided. Program developers saw a need to create follow-up opportunities to motivate participants to transfer their learning to a *place of practice*. A database was created for teachers to post and access lesson plans from their colleagues and mid-year meetings were established. This finding supports other studies which have indicated that when teachers do not have readily available resources, they are less

likely to transfer their practice (Bransford & Schwartz, 1999; Klingner & Boardman, 2011; Marini & Genereux, 1995; Murrill et al., 2013).

Murrill et al.'s, (2013) study included several important implications to the field of transfer of learning. First, the content information was based on evidence-based practices and included several experts in education. Teachers reported their knowledge had increased. While this implication aligns with other findings of transfer that initial learning is a critical step for transfer to occur (Engle, 2012a; 2012b; Haskell, 2001; Perkins & Salomon, 1988), others might disagree. Some have counter-argued that tools requiring self-reporting are a study limitation (Guskey, 2003; Hill et al., 2013; Yoon et al., 2007). Secondly, although the trainers attempted to bridge the place of learning with the place of practices, doing so was much more difficult to achieve. Transfer of learning did not occur for some teachers because the educational climate had changed, and support systems were not available in some places of practice, especially for schools that embraced a district-wide training professional development model. Murrill et al. (2013) study suggested if district efforts are utilized at the school level, teachers will need in-school support systems such as learning communities, supportive leadership, and access to available resources for transfer to be maintained. Clearly, environmental conditions affect the transfer of learning process. Personal conditions are equally important and will be discussed next.

**Personal conditions.** Personal conditions refer to internal behaviors that may facilitate or impede teachers' potential to transfer their learning. Reflective practices and teacher efficacy were influences that affected people's abilities and decision-making to transfer their learning.

Reflection plays a critical function in questioning our actions (Schön, 1987). Reflection allows us to think of ideas and test our understandings, and then affirms our decision to improve

our actions (Schön, 1987). Several terms, such as critical reflection, reflective practice, and reflective learning, are applied in education (Griggs, Holden, Lawless, & Rae, 2016; Larrivee, 2000). An emphasis on reflective practices as a strategy is often found in transfer of learning studies. Reflective practices are calls for action in which teachers “build capacity for on-going purposeful learning in relation to changing and demanding professional work” (Griggs et al., 2016, p. 1). These practices can take shape in various forms, such as professional learning communities (Penner-Williams et al., 2017) or teacher journals (McDonald & Melchior, 2008), where teachers are given opportunities to think about successes and to problematize challenges which can lead to setting goals for improvement. Through reflective practices, teachers are better able to examine how their previous learning can be adjusted and transferred into their current context (Antoniou & Kyriakides, 2013; Klingner et al., 1999; McDonald & Melchior, 2008; Penner-Williams et al., 2017; Pomerantz & Condie, 2017).

For instance, Antoniou and Kyriakides (2013) conducted an experimental study of the Dynamic Integrated Approach (DIA) in relation to teacher professional development and its sustainability one year after training. Their results suggested that the impact on student achievement varied according to teachers’ level of proficiency. Students who had teachers in **stage 1** had the lowest gains, whereas students with teachers in **level 4** had the highest gains. During the second data collection period, teachers who implemented DIA had made statistically-significant progress. Antoniou and Kyriakides (2013) made three recommendations regarding the impact on long-term teacher practices, of which two relate to reflective practices. First, they contended that there is a need to stop assuming that all teachers develop cognitive skills naturally. Teachers need continuous support to increase their knowledge base. They ascertained that perhaps professional development should vary according to the teachers’ needs. Second, they

found that teacher reflection related to instructional priorities is a critical piece for improvement. They observed when teachers reflected on broad aspects of their teaching, their practices rarely improved. However, when teachers paid attention to practices related to school priorities and acted upon their reflections, their practices had been refined. Their third recommendation called for teachers to utilize information from their reflective practices to address their professional needs and write plans on how they might carry out these actions.

Implications from Antoniou & Kyriakides' (2013) study contributes to existing literature on transfer of learning. First, findings reinforced the importance of initial learning. For teachers participating in their study who had low levels of content knowledge and skills, it was evident that the DIA content intervention of the study did not affect student achievement. Second, findings reinforced reflective practices as a significant activity in growing professionally and facilitating the transfer of learning process. Third, this study did not reveal issues related to the relationship between teacher content area cognition and personal barriers, ones that may have impacted participants' decisions to transfer their learning from professional development activities to their classroom.

Studies on transfer of learning showed that personal barriers were related to teachers' efficacy or their beliefs and capabilities about themselves and their teaching (Guskey, 2009; Kleinsasser, 2014; Pendergast, Garvis, & Keogh, 2011; Tschannen-Moran & Hoy, 2001). Some of these barriers were lacking initial knowledge or readiness (Dreer et al., 2017; Haskell, 2001; Klingner et al., 1999; McDonald & Melchior, 2008), forgetting information (Klingner et al., 1999), relapsing to original behavior (Cheng, 2016; Ford, 1994; & Salomon, 2012), or displaying a mismatch in dispositional factors such as motivation and attitude (Cheng, 2015; Dreer et al., 2017; Ford, 1994; Klingner et al., 1999; Perkins & Salomon, 2012).

In addition, the findings from Dreer et al. (2017) indicated that individual factors were related to transfer readiness. They found participants who had high dispositions at the start of the professional development program had the potential to transfer their learning; therefore, the program design played an important role to carry this out. *Transfer design*, they asserted, is “the degree to which the training has been designed to give teachers the ability to transfer the contents of the training to the school” (Dreer et al., 2017, p. 211). They suggested there is a need to study individual dispositions at the start of programs to understand different ways to prepare teachers for training situations; in this way, teachers with low dispositions can be quickly identified and better supported throughout the program. Lack of motivation and indifferent attitude were common attributes found in participants with low dispositions. Perhaps utilizing Thomas’s (2007) belief that assisting teachers to view transfer of learning *as a process rather than an event* might encourage them to change. However, Dreer et al., (2017) also argued that the school played a vital role in building the capacity of faculty within the school environment for transfer to occur, in terms of offering some form of follow-up support. The importance of support within the local context has been identified as an inconsistent practice in several transfer studies (Klingner et al., 1999; Leberman et al., 2006; McDonald & Melchior, 2008).

The factors affecting transfer presented in the previous section offered insights into how the environment and personal conditions can be influential in the success or failure of teachers’ transfer of learning. What is evident from this review is that each study contributes to expanding knowledge of transfer of learning as well as raises important questions. Barriers from the environment and personal conditions are situational. While similar factors may exist from context to context, some of this information may be irrelevant in other areas, which makes transfer of learning interesting and complex. Let us now take a look at the literature specifically

regarding one context: transfer of learning in remote areas.

### **Transfer of Learning in Remote Areas**

In this study the term “remote” refers to geographically-, structurally-, and psychologically isolated places that require cost, time, and effort for people to reach the nation’s urban core (Pacific Region Educational Laboratory, 1995). The independent nation focused upon in this study was in the geographical region of the Western Pacific, and is comprised of many small islands requiring air or ocean transportation to access. Despite advances in technology, communication systems in these remote areas are often unreliable. The setting for this current inquiry was Veritas Island (pseudonym) in the U.S. territory of Juntos in the Western Pacific. Independent nations in this part of the region are small in population size and vastly diverse linguistically, culturally, and geographically (Heine & Emesiochl, 2007). Despite the diversity, remnants of colonization can be seen throughout this region (Afamasaga et al., 2007; Heine & Emesiochl, 2007; Puamau, 2007). For instance, educational systems are framed around a Western school system where English is often spoken only at school, and instruction is delivered through a transmission model, or learning facts through rote-memory (Afamasaga et al., 2007; Heine & Emesiochl, 2007; Ramarui, 1976; Thomas & Postlethwaite, 1984). Puamau (2010) called this the “copycat” model of Western practices outweighs indigenous epistemologies. To better understand the local factors influencing transfer of learning in this area, I begin this section with a historical context of education, and then share key issues.

### **Historical Context of Education in the Western Pacific**

Many island nations in this Pacific region were claimed by faraway colonial powers due to the strategic importance of their location. Starting in the late 1800s, these islands were colonized first by Spain, then Germany (Heine & Emesiochl, 2007; Hezel, 2013; Ridgell, 2006).



At the start of World War I in 1914, Japan had overthrown Germany's rule from some of these islands, and soon Japanese rule significantly changed the lifestyle for these islanders. Many Japanese had migrated to these islands and established different types of infrastructure systems and practices, such as sugar cultivation and education (Hezel, 2013). Islanders were led to believe that these systems would enhance their quality of life; however, the systemic changes had significant consequences on their culture and lifestyle. For instance, islanders were forbidden to speak in their vernacular languages, forced to undertake laborious jobs in farming, and sent their children through an educational system whose beliefs, practices, and language were those of the colonizers (Petty, 2000).

After World War II, Japan surrendered many of these island nations to the United States. Several of these island nations then formed into a larger consortium called the Trust Territory, which was then governed by the U.S. (Heine & Emesiochl, 2007; Hezel, 2013; Ratliffe, 2011). The effective colonization of these islands continued but now with a U.S. influence. When political practices, legislative bodies, and election processes were introduced, a separate pathway from traditional practices of land and village governance started to form. The U.S. offered financial subsidies to increase educational and health services. Many islanders viewed these governmental services as a way to increase their financial capacity, and traded their lifestyle of working on their lands with becoming government employees (Heine & Emesiochl, 2007; Hezel, 2013).

Starting in the 1980s, the Trust Territory was disbanded, and several independent island nations began forging their own political agreements with the U.S. Government. While these independent nations became self-governing, U.S. federal funds continued to be a sizeable portion of their national budgets. For instance, funding for educational services to this day are

distributed through block grants from federal agencies, such as the U.S. Department of Interior and the USDOE (United States Department of the Interior, 2015). Without these funds, many LEAs could not support school improvement and professional development activities (United States Department of Education, 2016).

There are limited follow up studies (and professional development studies in general) in the Western Pacific to confirm if external providers have made any impact (Brady, 1983; Leberman et al., 2006). This is why, particularly for remote and under-resourced areas that lack adequate funding, investigating the effects of transfer of learning is too important to ignore. Acquiring accurate and sufficient information in order to maintain and improve transfer of learning practices has the potential to inform stakeholders how effective their educational investments have been over time. In return, LEAs can better understand how they can utilize resources more efficiently in the future (Antoniou & Kyriakides, 2013; Cheng, 2015; Fullan, 2006; McDonald, 2011).

### **Key Issues of Transfer of Learning in Remote Areas**

The studies reviewed in this section examine the longer-term effects of previous professional development efforts in remote areas. The three key issues of transfer of learning in remote areas include intentional planning, cultural influences, and lack of follow-up, which are detailed in the following subsections. These issues can serve as indicators for local communities to design self-sustaining professional development programs.

**Intentional planning.** Intentional planning is described as providers designing programs before, during, and after implementation (Bransford & Schwartz, 1999; Leberman et al., 2006; McDonald, 2011, 2012a; McDonald & Melchior, 2008; Thomas, 2007). Bransford and Schwartz (1999) claimed transfer of learning should be thought of not just in the moment but also in terms

of future payoffs. A comprehensive plan with the future taken into account has a stronger potential for teachers to apply their learning beyond the activity and into their context. Although existing literature has indicated intentional planning can be effective, it is a commonly overlooked practice, not only in remote areas, but also in the U.S. (Bransford & Schwartz, 1999; McDonald, 2011, 2012a). In remote locations, intentional planning is frequently reliant on program designs that involve only tenuously related practices, such as building the capacity of school staff and performing regular assessments of professional development programs at various stages of implementation (Leberman, McDonald, & Doyle, 2006; McDonald, 2011; McDonald & Melchior, 2008).

An example of intentional planning is documented in McDonald & Melchior's (2008) investigation of a tertiary provider (i.e., a university instructor hired for contract) who designed a dance program in Samoa. In their case study, details were provided on how the school's dance program was assessed before, during, and after the implementation. Information from each stage of the process was utilized for the program to be successful. For instance, before the program was designed, each teacher completed a needs assessment, and that information was used as baseline data throughout the process. One outcome of the needs assessment revealed teachers' lack of confidence in their ability to provide dance instruction. The consultant had designed the program with teachers' needs in mind. The principal also had the foresight to select two lead teachers to work alongside the university consultant. He knew that in the near future the contractual services would end, and the school-based staff would need to take the lead. The results from this case study suggested that transfer of learning was successful because of consistent collaboration between the university and the school-based leaders from the outset. The intentional planning (before, during, after) with the external consultant maximized

opportunities for teachers to learn strategies and skills on how to teach dance to their students. Moreover, these opportunities increased the teachers' confidence levels, which was, again, a need that was identified in the planning stage.

As indicated, the importance of intentional planning involves practices that build the capacity of school staff and refine the program at various stages of implementation. Though intentional planning is an effective strategy for program design, other scholars contend that paying attention to educational policies is equally important to ensure the continuity of the transfer process (McDonald, 2012a; Timperley & Phillips, 2003). Darling-Hammond and McLaughlin, (2011) asserted that new initiatives could not create a long-term impact if the existing policies did not align with the new vision. But in a remote area, setting policies can be even more complicated because of cultural influences. Afamagasa et al., (2007) explained that some LEAs continue to hold onto traditional methods of a top-down leadership style and practices. This approach can be difficult for teachers to articulate any ideas on the types of professional learning opportunities that would best meet their needs.

**Cultural influences.** The second factor affecting transfer of learning in remote areas is cultural influences (Afamasaga et al., 2007; Leberman et al., 2006; McDonald, 2012a). Leberman et al. (2006) have done the most comprehensive work in this area. For two years, they supported the implementation of in-service training, and then conducted a follow-up study of participants involved with The Cook Islands Teachers Development Project in special education. While their research has contributed extensively to the transfer of learning literature, for the purposes of this study I focus on the cultural aspects of their work in this section. They identified the roles of the participants and the cultural practices within the community as key determinants in the transfer of learning process.

The roles of the participants and the trainers were influential not only in the initial learning during the professional development activities, but also during the transfer of learning process (Leberman et al., 2006). In some cultures, the traditional and cultural role of elders is to teach the younger generation (Brady, 1983; Leberman et al., 2006; Ratliffe, 2010). Leberman et al., (2006) found their younger-aged participants were much more cautious about expanding their professional growth compared to their older counterparts. They observed the younger participants not verbally expressing opposing views of the elders, even though they had a different perspective. They were also discreet with implementing instructional practices that the elders did not support. The younger participants felt that having opposing views from the elders was a sign of cultural disrespect and they did not want criticism for their actions. These results are aligned with other transfer of learning studies, where members of the social context or organization can influence the process (Harris, Lowery-Moore, & Farrow, 2008; Penner-Williams et al., 2017).

In another example, Leberman et al., (2006) saw how influential the role of the elder was during the initial learning. They explained, “The senior/older teachers on a staff were considered to be gatekeepers for innovation and frequently perceived to be reactionary and inflexible. Criticism of them made it difficult for the teacher to implement or continue to use new course ideas” (Leberman, et al., 2006, p. 79). As a result, Leberman et al., (2006) identified the role of the trainer as significant in the transfer of learning process. They asserted the trainer should be knowledgeable in the local context and skilled in adult learning practices. They believed if the trainer had substantiated personal knowledge on the cultural roles before the training, then the trainer could have adapted the program design as a way to gain buy-in from the elders early in the implementation. They implied that perhaps all teachers could have increased their potential

to transfer their learning from the professional development activities into the classroom.

Attaining cultural knowledge is not an easy task, especially for external providers or trainers (Leberman et al., 2006).

The cultural practices significant in Leberman et al.'s (2006) research were collaboration and collectivism. In the Western Pacific, a person is thought to be a member of the group first over being an individual (Hezel, 2013). Participants preferred the trainer allowing everyone to work in small groups to build and extend their knowledge, as opposed to having individual tasks. Teachers embraced the opportunity to collaborate on designing lessons based on the research-based strategies they gained during training. Leberman et al. (2006) found that these collaborative activities enabled teachers to transfer the application of these strategies in the classroom during their data collection at the four-month and two-year mark after the training.

Collectivism, or working for the good of the group, often took precedent over an individual's learning in the context of the Cook Islands. Leberman et al. (2006) explained that the participants valued support from their colleagues and administration, but also sought support from their families and communities. Many teachers reported that family responsibilities and lack of familial support were barriers for their transfer. Participants who received familial support were perceived to have more motivation and physical support than those who did not. By also receiving extended support beyond the school context, participants reported that they would be less likely to receive criticism from colleagues who chose not to transfer their practices.

**Lack of follow-up.** The final factor in determining transfer of learning in remote areas is the lack of follow-up (McDonald, 2012; Puamau, 2007; H. Timperley, Wilson, Barrar, & Fung, 2007; Whitehead, 2010). Thomas (2007) argued that professional developers should know in advance of any situational barriers that may exist before, during, and after the total learning

experience. In remote areas, however, there is a high dependency on external funding to improve education, or what some call “donor-funded professional development” (Afamasaga et al., 2007; Leberman et al., 2006; Low & Davenport, 2002; McDonald, 2012a; Puamau, 2007). Donor-funded professional development has its advantages and disadvantages. Advantageously, external funding provides professional development opportunities and can boost the local economy (McDonald, 2012a). In addition, LEAs can benefit from systemic changes if the donor has similar cultural ways of teaching and learning such as how the Cook Islands benefited from the assistance from New Zealand (Puamau, 2007). Since, host educational systems in remote areas are not able to afford the types of professional development and resources offered by the donor. Thus, external funding is highly enticing.

However, some disadvantages to donor-funded professional development include budgetary limitations by local educational agencies (LEA) and a mismatch between educational efforts. Once external providers stop their support, most LEAs are not able to afford the professional development models and resources that were delivered. Because most external professional development set the learning outcomes based on the donors’ priorities (Afamasaga et al., 2007; Leberman et al., 2006; McDonald, 2012a), the LEA are left without an exit plan on how to integrate and sustain their learning with existing efforts at the end of the project (Low & Davenport, 2002).

Moreover, there are many communities whose distance from the island’s central urban core is quite far. Therefore, for teachers in remote areas, most of the follow-up activities or any professional development sessions occur during the summer because of the travel distance (Heine & Emesiochl, 2007). Yearly sessions often lead to disconnected learning. The frequency and contact hours for professional development are critical for transfer of learning to come to

fruition. For those situated in the island's central core there is potential due to their close proximity. However, access to professional development for those outside the central core can be problematic.

In summary, the issue of transfer of learning is particularly significant in remote areas. The vast geographical distances and under-funded resources can impede the process. Therefore, understanding these influences in these areas can serve as an investment toward designing effective professional-development models, ones that can withstand the challenges these educators may encounter after funding and external support have ceased. Existing literature suggests intentional planning (Bransford & Schwartz, 1999; Leberman et al., 2006; McDonald, 2011, 2012a; McDonald & Melchior, 2008; Thomas, 2007), understanding cultural influences (Afamasaga et al., 2007; Leberman et al., 2006; McDonald, 2012a), and follow-up support are key factors that can facilitate and perpetuate the transfer of learning process. However, as we shall see in this study, PREL did not intentionally plan for transfer to occur.

### **Conclusion**

The review of research and literature started with examining different aspects of transfer of learning. Themes provided a framework on how transfer of learning has evolved from a series of replications into ways of exploring transfer of learning processes. The triadic reciprocal determination model was presented as way to examine how personal experiences, behavior, and the environment can influence transfer of learning. The discussion also included the impact of professional development models, and the unique variables to be considered when implementing professional development for teachers in remote areas.

Professional development programs are integral to transfer of learning due to their analogous relationship as the initial learning situation. Learners must accumulate substantial



knowledge in the original situation for transfer to take place. In this study, the initial learning was the Pacific CHILD program. How teachers have utilized their learning, if any, from Pacific CHILD is one of the problems addressed in this study. With an ever-changing educational landscape, transfer of learning is shaped not only by a teacher's cognitive abilities, but also their interactions with the environment and their personal experiences. Reflective practice, attitude, and motivation can assist with participants bridging their learning from professional activities to the classroom. However, in remote areas, such as the one in this study, cultural factors are also influential in the process. Understanding aspects of transfer of learning and professional development programs will assist educational agencies and educators in remote areas in designing models that can serve as a long-term investment.

## **CHAPTER 3**

### **METHODOLOGY**

This qualitative study is framed within a phenomenological examination of teachers' transfer of learning experience and factors affecting participants' transfer after their involvement in a two-year reading professional development program. What follows are the research questions and the steps and instruments used in this study. I conclude with a reflection in my role as researcher.

#### **Research Questions**

This research is guided by the primary question:

What lessons can be learned regarding transfer of learning several years after the completion of a two-year professional development program in reading in the Western Pacific?

The secondary question is:

What factors in their environment, experiences, and behaviors do teachers report have affected their transfer and integration of professional development strategies and concepts several years after the program's completion?

#### **Qualitative Research: Investigating Lived Experience**

Since this inquiry involved understanding participants' experiences, a qualitative design was implemented. The benefits of using a qualitative research design presents the researcher with opportunities to better understand a situation and its participants throughout the process of studying the phenomenon (Merriam, 2009). Specifically, researchers are permitted to apply an inductive process, where "researchers gather data to build concepts, hypotheses or theories" (Merriam, 2009, p. 15). Although I had contemplated other qualitative methods, such as grounded theory and case study, my interest rests with understanding and describing participants'

lived experience. In this study, I draw primarily on the work of Moustakas' (1994) descriptive or transcendental phenomenology to inform my methodology. As I am a newcomer to educational research, Moustakas' (1994) approach offered a balance of structure and flexibility that I felt was helpful in guiding my design to ensure trustworthiness and credibility during the process.

Phenomenology is an experience to generate new knowledge (Moustakas, 1994). Specifically for the purposes of this study, a phenomenological lens helped me uncover the transfer of learning process, and the factors in participants' environments, experiences, and behaviors among teachers who participated in Pacific CHILD. This approach is in contrast to the original Pacific CHILD evaluation, where quantifiable terms such as "statistically significant" or "outperform" captured the participants' stories of success. Harmon (1991, p. 53) asserted, "We do not learn about reality from controlled experiments but rather by identifying with the observed" (as cited in Moustakas, 1994, p. 46). By conducting surveys, interviews, and focus groups, I apprehended a first-hand account of participants' *lived experiences* after Pacific CHILD. I contend that these experiences have the potential to inform others who are designing or participating in long-term professional development programs.

### **Describing Phenomenology**

Phenomenology is an approach to understanding humans' experience with the world from one person's point of view (Bolton, 1979; Burnette et al., 2011; Sloan & Bowe, 2014). According to Moustakas (1994), the meaning of *phenomenon* has origins in the Greek words, *phaenesthai*, which means "to flare up, to show itself, to appear" (p. 26) and *phaino*, which means "to bring to light, to place in brightness, to show itself in itself, the totality of what lies before us in the light of day" (p. 26).

Phenomenology is viewed as a philosophy and a research methodology (Merriam, 2009; Moustakas, 1994; Sloan & Bowe, 2014). The roots of phenomenology are based on the philosophical works of Husserl, Kant, and Descartes (Moustakas, 1994). Philosophers believed “the form and continuity of experiences are products of an intrinsic relationship between human beings and the world” (Polkinghorne, 1989, p. 42). Philosophers sought knowledge not on how the underlying structure of these experiences was universal, but how individual stories were unique (Burnette et al., 2011). For instance, many people experience joy, happiness, and sorrow. Yet, the journey to these experiences is quite different for each person.

The *lived experience* and *essence* are two terms associated with phenomenology. The *lived experience* is known as a person’s life event and how it is transformed into consciousness (Merriam, 2009; Moustakas, 1994; Sloan & Bowe, 2014). The next term is *essence*, or the structure of the experience (van Manen, 1990). In this study, the *lived experience* is the participants’ professional development journey after their participation in Pacific CHILD, and the *essence* is the descriptions of their journey.

Starting in the late twentieth century, social scientists began thinking of phenomenology as an avenue of research to better understand experience (Merriam, 2009; Sloan & Bowe, 2014). Merriam (2009) describes phenomenological research as understanding “how experiencing something is transformed into consciousness” (p. 24). This methodology of learning about human experiences has expanded into the social sciences, psychology, health sciences and education (Creswell, Hanson, Clark Plano, & Morales, 2007; Merriam, 1998, 2009; Moustakas, 1994; Plano Clark & Creswell, 2010; Spiegelberg, 1969; van Manen, 1990).

Phenomenology is often analyzed in two broad categories with iterations within each (Lopez & Willis, 2004; Sloan & Bowe, 2014). The first category is interpretative

phenomenology. In this method, researchers seek understanding of human actions or expressions through interpretation, as opposed to understanding people's consciousness (Gallagher, 1992; Sloan & Bowe, 2014; Valle, King, & Halling, 1989). A common iteration of interpretive phenomenology is hermeneutics. The word hermeneutic is of Greek origin, arising from the god Hermes, whose role was to communicate messages from the gods to the mortals (van Manen, 1990). For Hermes, this was quite difficult, because he needed to *interpret* the meaning of messages for either the gods or the mortals to comprehend. Thus, hermeneutic phenomenology is to understand human phenomena through the interpretation of text or language (Gallagher, 1992; Lopez & Willis, 2004; Sloan & Bowe, 2014; Valle et al., 1989). Three elements of hermeneutics include the acts of reading (observing), understanding the conditions of the context involving the reader (phenomenon), and analyzing the structure of text (description of phenomenon). Gallagher (1992) explained that none of these elements—reader, text or meaning—exist in isolation.

The second category is descriptive phenomenology. A mathematician and philosopher, Edmund Husserl, is known for initiating the descriptive phenomenological movement (Lopez & Willis, 2004; Moustakas, 1994; Spiegelberg, 1969). He believed that true meaning could be explored by delving deeper into reality (Sloan & Bowe, 2014). Descriptive phenomenology is intended to understand the relationship between human consciousness and objects of knowledge (Moustakas, 1994; Sloan & Bowe, 2014; Spiegelberg, 1969; van Manen, 1990). An iteration of descriptive phenomenology is transcendental phenomenology, or the belief that all objects of knowledge must conform to an experience (Moustakas, 1994). To acquire this knowledge, one must go through a process of reflection and understanding of human consciousness (Moustakas,

1994; Spiegelberg, 1969). When the subject and object of the phenomenon are carefully analyzed and explicated, it then *transcends* into a deeper meaning.

In this study, I chose to employ a descriptive or, specifically, a transcendental-phenomenology approach. In transcendental phenomenology, the researcher frequently reflects to avoid any biases and to allow for the participants' experience to come to consciousness (Lopez & Willis, 2004; Moustakas, 1994). Second, transcendental phenomenology appreciates the value when participants' have a common experience. Spiegelberg (1969) asserted the phenomenon "have a common point of departure" (p. 2) yet might not have a defined destination. In this study, the departure point was the conclusion of participants' involvement in Pacific CHILD in 2009. The undefined destination was the participants' experiences and motivation to transfer their learning into their environment. Moustakas (1994) further explained that phenomenon could travel at different speeds, and its "development is determined by intrinsic principles as well as by the 'things,' the structure of the territory which it encounters" (p. 2).

### **Research Context**

The remote setting of this study occurred on Veritas Island in the Western Pacific. Veritas is the capital of this U.S. territory. The territory consists of many islands, but the majority of the population lives on one of the three main islands. The total population is 51,000 people (Central Intelligence Agency, 2015). Geographical distance in this area of the Pacific is vast. Air travel is the primary mode of transportation to access these islands.

Asians (e.g., Filipino, Chinese, Korean) are the largest ethnic group, comprising 50% of the population, and indigenous ethnic groups make up 28.5% of the population. English and the indigenous language are the official national languages, and about 30% speak a form of a language found in the Philippines (Central Intelligence Agency, 2015).

At the time of this study, the Veritas Department of Education had ten elementary schools and six junior/high schools. The total student population in the 2012-2013 school year was 10,500. All schools earned national accreditation as approved by a U.S. mainland external agency. All teachers are required to have a bachelor's degree and need qualifying scores on the PRAXIS examination to be considered a highly qualified teacher.

### **Participant Selection**

During Pacific CHILD, all ten elementary schools were participants in the RCT. Five of the treatment schools were located on Veritas Island. Five of the control schools were located on Veritas and two other neighboring islands. Teachers from treatment schools were the targeted participants for this study.

A purposeful sampling (Merriam, 2009) was implemented to target only teachers from treatment schools on Veritas Island for this study. While 197 teachers were identified in the Pacific CHILD evaluation study, those numbers were based on participants in treatment and control groups from all three remote areas (Abe et al., 2012). In Veritas, nineteen teachers were identified as potential participants. Participant selection was based on three criteria. The first criterion was directly related to the number of hours participants were involved in Pacific CHILD. I utilized Yoon et al.'s (2009) claim that teachers who participated in an average of 49 hours of professional development activities are more likely to boost their students' achievement. The second criterion was participants' duration in Pacific CHILD—specifically, a two-year involvement. For these two criteria, I had access to the attendance sheets and activity record logs to verify that each participant was involved with at least 49 hours per year and for two years. My third criterion was participants' current involvement in education. If participants were not in an educational context, there was less potential for transfer to occur. During the Pacific CHILD

program, PREL staff worked only with teachers in the fourth and fifth grade with their implementation of English language arts. In this study, I chose not to bound participants based on their current grade level or by their content area instruction. I felt it was more important to understand the factors and process of the transfer of learning process, regardless of their current grade level or the subject matter expertise. Based on these criteria, eleven participants were identified. All volunteered to participate in this study at varying levels. Some were much more willing than others to share their experiences. I explain this more in chapter 4.

The primary method of collecting demographic information was through the use of a survey (see Appendix A). However, in two instances, the participants did not complete the online survey. One person had difficulty accessing the information on the Internet. The second person chose not to complete it initially, but completed it later. As a result, I collected demographic information during the semi-structured interviews from both participants.

The participants included ten females and one male participant. Two participants were administrators (e.g., principal, vice principal). One participant was an instructor at the community college. Two participants were retired classroom teachers, but currently worked as part-time tutors, and six participants were classroom teachers. Two participants were teaching in the same grade level and same school during their involvement with Pacific CHILD. Five participants were at the same school, but working in a different grade level or in a new position. Of the eleven participants, four were not in the same school. A summary of the participant demographics for this study is represented in Table 2.



Table 2: *Participant Demographics*

Profile	# of participants
Gender	
Male	1
Female	10
Total number of teaching experience in a K-12 setting	
1-5 years	1
6-10 years	2
11-15 years	3
16-20 years	3
21 or more years	2
Current grade level/position	
1 <sup>st</sup>	1
3 <sup>rd</sup>	1
4 <sup>th</sup>	1
5 <sup>th</sup>	1
7 <sup>th</sup>	1
8 <sup>th</sup>	1
Administrator	2
College Instructor	1
Title I Tutor	2
Currently teaching in the same grade levels as his/her participation in the two-year program	
Yes	2
No	9
Currently assigned to the same school as his/her participation in the two-year program	
Yes	7
No	4

### **Data Collection**

The data collection schedule was designed to gather information about teachers' transfer of learning process and factors affecting their transfer. Instruments to collect data were a teacher background survey (see Appendix A), a semi-structured interview (see Appendix B), a transfer for learning checklist (see Appendix C), and a focus group (see Appendix D). Data were collected electronically and in print. To ensure participants' privacy I stored electronic data (e.g.,

field notes, digital audio recordings, surveys) in a password-protected computer. Print data was collected and scanned into a digital copy, then later destroyed using a paper shredder.

Prior to the data collection I passed a training course on research procedures administered by the Collaborative Institutional Training Institute (CITI). Certifying my knowledge of research procedures of human subjects is a requirement by the University of Hawaii at Mānoa's Office of Research Compliance. Afterward, I obtained approval for this study as an exempt research project (see Appendix E). I also received research approval from the LEA on Veritas Island.

Data collection occurred in two rounds. The first round was conducted online. Participants were sent an email with information about the study. If they were interested in voluntary participation, there was a link embedded in the text that connected them to the survey. An electronic signature was then used as the participant's consent in this study (see Appendix A). Written directions explained that the participant could stop at any time while taking the survey and they would be contacted later for the second round of data collection (e.g., semi-structured interviews, focus group).

The second round of data collection occurred in person on Veritas Island. During this round, the semi-structured interviews, the checklist, and focus groups were implemented. Participants also signed a separate consent form verifying their participation in the semi-structured interviews and focus groups (see Appendix F). At the start of the interviews and focus groups I reiterated that their involvement was voluntary, they could stop at any time, and they would receive a \$15.00 gift card for their participation. I also informed them that a transcript of their interviews and/or focus group for verification and approval would be sent at a later time, and collected a non-work related email address.

## Instrumentation

Four instruments were used in this study: (1) a teacher background survey, (2) semi-structured interview, (3) a checklist of transfer, and (4) focus groups. The University Of Hawai‘i at Mānoa Human Studies Program approved each instrument prior to the data collection (see Appendix E).

Plano-Clark and Creswell (2010) posited that a good instrument is able to collect information based on the inquiry. I designed a crosswalk among the tools to show how each instrument would address the research questions, and to determine if my data collection methods were efficient (see Table 3). For instance, on the survey, I asked participants to rate their frequency to implement specific instructional techniques, and their ability to teach to language arts standards. Then in the interview and focus group, I asked questions that would allow participants to further elaborate on their current experiences. By including related items in each instrument, I assumed that I would gain deeper insights on what lessons could be learned regarding transfer of learning.

Table 3: *Crosswalk of Items*

Research Question	Sample item within the instrument		
	Survey	Semi-structured Interviews	Focus Group
What lessons can be learned regarding transfer of learning several years after the completion of a two-year professional development in reading in the Western Pacific?	<ul style="list-style-type: none"> <li>Rate the frequency of the selected instructional technique.</li> <li>My ability to teach in the language arts standards is limited by...</li> </ul>	Why do you continue (or discontinue) the use of Pacific CHILD in your context?	From your perspective, did Pacific CHILD meet your individual needs so that you were able to implement the strategies independently (e.g., without PREL support)?

**Teacher background survey.** The Teacher Background Survey was given to participants prior to their interview (see Appendix A). The survey provided a statistical description of the participants in the study (Creswell, 2003). Although this study is framed using a qualitative research design, the survey was used to collect demographic data to determine avenues in which the transfer of learning process may have occurred. For instance, I used a Likert Scale to measure the amount of instructional time the participants spent implementing any strategies from Pacific CHILD.

I modified the original survey from Pacific CHILD (Abe et al., 2012) to address the research questions for this study. Modifications included deleting unrelated items (e.g., Do you hold an Associate Degree?), associated activities supported by PREL since they were no longer involved (e.g., How do you rate PREL staff's ability to emphasize the Pacific CHILD components during the institutes?), and items disconnected to the research questions (e.g., How do you rate your English fluency?). Creswell (2003) cautioned that modifications to existing surveys might not hold validity in the new research. However, this study was not intended to assess differences among treatment settings, or to use the responses as covariates as it did in the original study. Instead, the responses were intended to understand the participants' transfer of learning experiences and to prepare the researcher for the interviews and focus groups. Since Pacific CHILD involved selected participants, it was difficult to find participants who would have firsthand knowledge of the prompts. Therefore, a former PREL colleague who was also involved with Pacific CHILD took the survey as a form of content validity.

As a result, the survey was modified for two different groups (see Appendix A). One version was for practitioners who were currently working with students. It was important to analyze the data and see the practitioners' experience with transfer. The second version of the

survey was for administrators who did not work with students. Distinguishing both groups was critical. Administrators were most likely to respond “not at all” to any items related with students. I was interested in gaining insights on how administrators may have transferred any practices in their own context, especially with teachers and faculty.

The survey had two parts. Part one was designed to collect information about the participants’ professional backgrounds (e.g., teacher credentials, years of teaching experience) using selected responses (e.g., which of the following teaching credentials do you hold?) or short responses (e.g., how many years have you been teaching?). Part two was designed to understand participants’ perceptions of their instructional practices and student learning. All responses were in the form of Likert scales such as qualifiers (e.g., strongly disagree to strongly agree) and frequencies (e.g., never to several times per day).

The survey was administered online using Google Forms. Each participant was sent a uniform resource locator (URL) via email to access the survey. I also offered the option for participants to complete a print version of the survey. I had estimated that each participant would take 15-20 minutes to complete it.

Before the participants took the survey, I described study information that included the types of activities involved (e.g., survey, semi-structured interview, focus group), benefits, risks, and confidentiality. The last part asked for an electronic signature as a form of consent for their voluntary participation in the study (see Appendix F).

Nine participants completed the online survey, one participant completed a print version, and one participant declined. For the participant who declined, demographic data were collected during the semi-structured interview. All survey responses were self-reported. The results are presented in chapter 4 and in Appendices H and I.

**Semi-structured interviews.** In phenomenology, interviews are the primary method of collecting data. Interviews allow the participant to be the expert of the phenomenon and the information yielded provides in-depth description (Bevan, 2014; Roulston, 2010; Seidman, 2006). I utilized Bevan's (2014) phenomenological interviewing domains consisting of contextualizing, apprehending the phenomenon, and clarifying the phenomenon. The first domain, contextualization, involves the gathering of information to understand the participant's context (e.g., current positions, experience *during* Pacific CHILD) and experiences leading up to the phenomenon (e.g., experience *after* Pacific CHILD). I also confirmed demographic information and learned more about their current roles. Their responses segued so that the participant could begin to think about the phenomenon. Bevan (2014) advised that the researcher be flexible and ask questions related specifically to the individual. Since the majority of participants completed the survey prior to the interview, I was able to analyze their responses and then tailor questions for the follow up interview.

The second domain, apprehending the phenomenon, is the direct focus of the phenomenon that interests the researcher (Bevan, 2014). Here participants may describe their lived experiences through various ways such as analogy, chronology, or narrative (Bevan, 2014). I utilized a narrative approach and designed descriptive questions (e.g., Why do you implement activities/strategies from Pacific CHILD in your context?) as well as follow-up structural questions (e.g., How did you determine which specific activities/strategies to continue to implement?) in order to capture the participants' experiences. I also showed pictures from Pacific CHILD as a way to drop "hints" to help with the retrieval process (Gick & Holyoak, 1983). Hints served as a stimulus to help the learner recall information and to connect past and present.

The third domain, clarifying the phenomenon, involves the use of imaginative variation (Bevan, 2014). “Imaginative variation” refers to the researcher uncovering the structural components and seeing the phenomenon from various perspectives (Bevan, 2014; Moustakas, 1994). Questions in this domain are rooted from participants’ previous descriptions of the experience. The researcher’s ability to actively listen and connect past and current experiences continue to build the participants’ lived experiences.

Each participant was scheduled to be interviewed twice in person, via phone or online. A semi-structured interview protocol was utilized during the initial interview, which lasted between 45-60 minutes (see Appendix B). Similarly to the survey, I began the interview with providing an overview of the study, the benefits and risks, and confidentiality agreements. I also asked participants if they had any questions before requesting their signature on the consent form (see Appendix F).

The first set of interviews took place on Veritas Island. Ten of the eleven interviews occurred either in the participant’s classroom or the school office for convenience. One interview took place off campus because the participant felt more comfortable. Another instrument, the Transfer of Practice Checklist (see Appendix C), was used to document any artifacts (e.g., student work samples, print around the room) as evidence of whether transfer had taken place, and in order to strengthen trustworthiness. To ensure the accuracy of my depictions of participants’ lived experiences, I also recorded their interviews and took written field notes.

The second interview occurred either in person or via phone using Seidman’s (2006) time frame (of three to seven days apart, and within a three-week span). Two participants declined a second interview; they had been reluctant to be involved for their first interview, so I was not surprised. Another participant could not do a second interview within the three-week span due to

lack of phone services from a broken underwater cable. This same participant later had minimal communication service as a result of destruction caused by a typhoon that had hit the island.

After the interviews took place, each participant received a transcript as a form of member checking (Carlson, 2010; Merriam, 2009). Nine of the eleven participants returned their transcripts with revisions, or agreed to the statements that were said in the interviews. Each interview was transcribed and individual profiles were created. Results from the semi-structured interviews and individual descriptions will be discussed in chapter 4.

**Transfer of learning checklist.** In transfer of learning studies (Cheng, 2015; Klingner et al., 1999; Leberman et al., 2006), classroom observations were forms of data to determine if participants continued their practice. Conducting observations for this study presented two significant challenges. The first challenge revolved around the authenticity of the lesson. There was no assurance a) if the participants were teaching a lesson because the strategies from Pacific CHILD were common practice in their daily instruction, or b) if they were implementing a lesson due to my presence in their classroom. Second, I would need to collect assent forms for each student who participated in the lesson in accordance with ethical obligations of Human Studies protocol at the university. Although teachers were the participants, student involvement in the lesson was also seen as contributing to the research. For instance, how students responded to their teacher had the potential to offer evidence on the impact of instruction.

Instead, I collected artifacts as a way to verify if any transfer had taken place. Collecting artifacts is a common practice in qualitative studies (Glesne, 2015; Leberman et al., 2006; Merriam, 2009). Stake (2004) suggested artifacts could establish a chain of events and the history of involvement with programs. Since the interviews had taken place on the school site



and at the end of the school year, I assumed that if participants had transferred any practices or artifacts from throughout the year, they would exist in their environment.

With the committee's and IRB approval, I developed a transfer of learning checklist (see Appendices C and G). The checklist was utilized during the semi-structured interview and as a part of the triangulation process. Based on participants' responses on the survey, I looked around the environment for any artifacts as confirmation. For example, one participant responded on the survey that she provided vocabulary instruction one to two times per day. In her classroom, I saw artifacts of students' work that demonstrated their vocabulary knowledge of government types, such as theocracy, anarchy, and oligarchy.

I framed the checklist to reflect the transfer of learning and triadic reciprocal determination (Bandura, 1978, 1983, 1986, 1989) theories. On the checklist, I created categories as way to identify the participant's sources of influences that reflected the triadic reciprocal determination model (see Table 4). A checkmark with any influences from the environment were marked with an *E*. Any experiences influenced by personal experiences were marked with a *P*. Any experiences influenced by a person's behavior were marked with a *B*.

Multiple steps were utilized with the checklist. My first task was to seek evidence of transfer from Pacific CHILD. The second task was to document the types of artifacts that existed. Finally in the semi-structured interview, I included a question regarding the transfer practice, and used the artifact as a prompt to further understand if the environment, person, or behavior were influences for continued implementation. Merriam (2009) described that it is the researcher's responsibility to gain information about the authenticity and accuracy on how the artifact is being used. For instance, one participant showed me a student's visual organizer of the text structure on sequence. She explained that, based on her experiences, students were better

able to comprehend text when they drew images or graphic structures to represent information from the book. In the designated section of text structure on the checklist, I marked an X in the observed box, cited the example, and then marked P (person) and B (behavior) to represent the influences (see Table 4).

Table 4: Example of transfer of practice checklist

Prompt	Observed	Not Observed	Examples of Artifacts	Influence (rationale for implementation)		
				E	P	B
1. Is there evidence of the teaching of and/or student learning of text structure?	X		<ul style="list-style-type: none"> <li>• Student evidence (sequence of life cycle)</li> <li>• Venn diagram of compare and contrasts</li> <li>• List of signal words</li> <li>• Text features list (feature and purpose)</li> </ul>		X	

**Focus group.** Focus groups bring several people together to discuss specific topics from different points of views (Bradbury-Jones, Sambrook, & Irvine, 2009; Merriam, 2009; Webb & Kevern, 2001). Bradbury-Jones et al. (2009) ascertained that focus groups align with descriptive phenomenology (e.g., transcendental phenomenology) because they challenge the researcher “to bracket their prejudices because their assumptions are challenged by other group members” (p. 667). I conducted two in-person focus groups on Veritas Island. Each lasted 60 minutes. I started the focus group by reviewing the group protocol (see Appendix D). Since Veritas is a small community, I stressed the importance of mutual respect, confidentiality and privacy. I requested that each person share their thinking and experiences regardless of whether their thoughts were similar or different from their colleagues. I also took written field notes and recorded the focus groups using two different digital audio recorders (one on each end of the

table) to ensure accuracy. Similarly to the interview, I used pictures to serve as “hints” (Gick & Holyoak, 1983) as a way to stimulate conversation with connecting past and present.

In qualitative research, issues regarding trustworthiness are of high concern, due to the nature of the researcher being the primary source of collecting data (Merriam, 2009). The instruments in this study required participant to self-report,). I will address the issue of trustworthiness later in this chapter.

### **Phenomenological Data Analysis**

In qualitative research, data analysis is inductive when the researcher reviews data that are descriptive and general (e.g., themes, codes), and iterative when the researcher goes back and forth between the collection and analysis (Merriam, 2009; Plano Clark & Creswell, 2010). Some believe that data analysis should begin as soon as the data collection begins (Glaser, 1965; Merriam, 1998, 2009; Plano Clark & Creswell, 2010). In this study, data methods were deployed at different times and analysis happened immediately. For instance, the survey was sent about one month prior to the semi-structured interviews and some of the survey results assisted with forming some interview questions.

In this phase of the research process, I selected a phenomenology orientation and analysis around four distinct processes: epoche, phenomenological reduction, imaginative variation, and synthesis of composite textural and composite structural description (Moustakas, 1994). Because phenomenology also uses an inductive process to analyze the data, the processes are quite similar to the qualitative methods of bracketing, coding data, forming categories, and then generating themes (Creswell et al., 2007; Merriam, 1998, 2009; Plano Clark & Creswell, 2010; Schram, 2003). I carefully examined the data from each instrument independently, and then

combined the data to conduct a comparative analysis across the different data sets. The qualitative software NVivo assisted me with the organization and analysis of the data.

## **Epoche**

“Epoche is a Greek word meaning to stay away from or abstain” (Moustakas, 1994, p. 85). While there is no formula to know when the researcher has achieved epoche, Bevan (2014) claimed that the researcher ultimately goes through an attitudinal shift and becomes able to accept new ways of thinking about the phenomenon. In qualitative research, this refers to bracketing (Creswell et al., 2007; Merriam, 1998, 2009) or examining one’s positionality, or their participatory role with the participants (Carducci, Pasque, Kuntz, & Contreras-McGavin, 2013; Herr & Anderson, 2005). Throughout the data collection and analysis periods, I used a digital audio recorder or made field notes to record my thoughts as a form of epoche. This enabled me to carefully examine my experiences and self-reflect as a way to identify biases, judgments, or presuppositions (Balls, 2009; Landreman, Rasmussen, King, & Jiang, 2007; Merriam, 1998, p. 19, 2009; Moustakas, 1994; Plano Clark & Creswell, 2010; Schram, 2003). In chapter four, I provide an account of how epoche was applied during the data analysis.

## **Phenomenological Reduction**

Phenomenological reduction requires the repetition of looking at and describing data for structural qualities (e.g., the phenomenon, act of consciousness, experience of the participant) and textural qualities (e.g., sounds, descriptions) (Moustakas, 1994). The task during reduction was to closely examine the meaning of the participants’ lived experiences by utilizing the phenomenological concept of “horizontalization.” This involved treating each data point as having equal value. From there, qualities were clustered to form categories and outliers were removed. Outliers comprised of datum that did not fit into a category. Next, textural

descriptions are given for each category. Textural descriptions are participants' verbatim phrases to consciously gain insight to the phenomenon and its meaning (Moustakas, 1994).

### **Imaginative Variation**

The third step, imaginative variation, involves the researcher viewing the phenomenon from different perspectives and then developing structural descriptions (Merriam, 1998; Moustakas, 1994). The steps of imaginative variation include understanding the structural meaning of the categories, clustering these categories and formulating themes, and then preparing to develop a structural description of the phenomenon (Moustakas, 1994). The themes are intended to approach the phenomenon from varying frames of reference. One such example can be found in a phenomenological study on critical consciousness conducted by Landreman and colleagues (2007). In their work, the themes of exposure to diversity, critical incidents, and self-reflection during the imaginative variation phase were generated. A similar approach was applied in this study.

### **Synthesis of Composite Textural and Composite Structural Descriptions**

The composite textural and structural descriptions are intended to unify the themes identified during the imaginative variation. These themes are then clustered to describe the *lived experience* as a whole group. Moustakas (1994) explained the essences are never exhausted but represent participants' particular time and place. For example, the participants in this study will always be on a journey of utilizing their experiences from Pacific CHILD. But I was able to capture a snapshot approximately six years later in their current educational role.

Phenomenology explores participants' lived experience through their words and narratives. To ensure trustworthiness of their personal accounts, I employed different methods, which will be described next.

## **Trustworthiness**

Validity and reliability examine the research components and their parts using different strategies. Validity refers to the accurate account of the social phenomenon (Schwandt, 1997 as cited in Creswell & Miller, 2000). “Reliability refers to the extent to which research findings can be replicated” (Merriam, 2009, p. 220). In qualitative studies, validity is difficult because the researcher is the primary instrument of data collection (Carlson, 2010; Creswell & Miller, 2000; Merriam, 2009). According to Carlson (2010), trustworthiness involves the researcher doing everything possible to ensure the data was collected, analyzed, and reported using ethical practices. Therefore, I employed different strategies to ensure trustworthiness and credibility in this study. In addition to epoche, I utilized member checks, triangulation, audit trails, and reflexivity as to ensure trustworthiness.

**Member checks.** Member checks are opportunities for participants to verify and offer feedback on their responses from their interviews and/or focus groups (Carlson, 2010; Merriam, 2009). Participants were sent a copy via email for his/her review and feedback. Nine of the eleven participants sent feedback and/or confirmation. I will provide more details about member checks in chapter 4.

**Triangulation.** Triangulation involves comparing multiple sources of data to validate the evidence (Merriam, 2009). A survey, semi-structured interviews, a checklist, and focus groups were the primary instruments. Epoche and field notes were other data sources. To enhance trustworthiness, I also checked participant responses across data collection practices. For instance, if a participant responded on the survey that she continued to teach text structure strategies, I asked questions about text structure during the semi-structured interview, and used the checklist to document artifacts in the classroom.

**Audit trails.** I exercised epoche and also left digital and paper audit trails of what I was implementing and why. I made data collection schedules and analyze the data immediately. After analyzing the data, I made memos on what I discovered and wrote any queries to further explore.

**Reflexivity.** A form of internal reliability is about examining positionality and biases in different contexts of the study (Carducci, et al., 2013; Glesne, 2015; Merriam, 2009). For example, having worked with the teachers in the PREL project provided a context in which they may have felt more comfortable talking to me. My being an outsider to the community may have influenced how participants talked to me and yet as a Filipina woman, I felt that at times I was also seen as an insider. I maintained reflexivity, by thinking critically about my different roles with participants (Merriam, 2009) throughout this study and how these roles may have affected participant interaction and how I interpreted their stories. I attempted to address these and other biases and assumptions by communicating with my dissertation chair and recording my thoughts. In the next section I describe in more detail how my work as an educator influenced and led me to this study.

### **Role of the Researcher**

As a third-generation Filipina born and raised in Hawaii, I view myself as an outsider who had access to this study through my prior experiences working on various projects with the Veritas Department of Education. These experiences included collaborating with state resource teachers to lead professional development sessions in reading, facilitating their development of standards-based assessments in language arts, and assisting with designing curriculum for their bilingual programs. I believe my experiences before my work with Veritas Department of

Education contributed significantly to my ability to build rapport and work effectively with in-service teachers.

I began my career working as an elementary classroom teacher in a Title I school. Many of my students were struggling readers and came from low-income families. When I became a Title I Resource Teacher, I learned how federal funds assisted students and school initiatives. I was able to lead professional learning activities for the whole school, including grade levels and interest groups (e.g., reading, writing, technology). I was also able to design professional development courses (e.g., literacy, assessment) that enabled many teachers to receive the credit that enabled them to move up the salary pay scale.

When I changed careers and became a Reading Specialist at the non-profit organization PREL, my work with in-service teachers increased and broadened. I frequently traveled to the United States Affiliated Pacific Islands (i.e., Commonwealth of the Northern Mariana Islands, the territories of American Samoa and Guam, Federated States of Micronesia, Republic of the Marshall Islands, and Republic of Palau). My working knowledge expanded in areas such as developing standards-based curricula and materials, and designing small- and large-scale assessments. For instance, I facilitated work groups during the development of the LEA's standards-based assessments in language arts. I collaborated with English Language Learner and Bilingual Language resource specialists in implementing their program initiatives. I also led a team of literacy specialists from different areas of the Pacific to improve reading in the early elementary grades in their local context. Again, my work in these areas was federally funded. I saw how federal funds were beneficial because they provided opportunities for professional growth. Yet at the same time, I saw how the federal government perceived the LEA as needing to improve in targeted areas, and the latter were only allowed to spend funds on these initiatives.



When the Pacific CHILD program for fourth- and fifth-grade teachers was implemented at PREL, I was the overall team leader, and delivered professional development activities to participants primarily in Hawaii. I was involved in a few sessions on Veritas Island and consequently met many educators, including the participants. However, at the time of this study several years had passed since I had communicated with any of them. I did not view these previous encounters as a form of bias.

On the other hand, these prior experiences were advantageous in giving me access to conduct the study on Veritas. The Veritas Director of Education had been supportive of this research since inception, and gave approval for me to conduct this study. She also informed school principals of my plans to contact participants from their school about my study. Another source of support came from a state resource teacher. She remained in communication with me after my fieldwork and sent updates about current happenings.

Glesne (2015) stated that being a researcher also means presenting yourself in a way that fits in and is welcomed. My previous experiences working on Veritas along with being a Filipina was helpful with connecting with the participants on a personal level. Since 32% of the island population is of Filipino descent, my physical appearance was relatable to other Filipinas living in Veritas. During the data collection, many of my interactions ended with the participants wanting to know my ethnicity and how my family lineage traced back to the Philippines. I also learned about the participants' journeys from the Philippines to Veritas Island, and about some of their personal struggles and joys. I was also fortunate to meet a participant's child, an alumnus from my university.

Based on these experiences, my positionality on the continuum of outsider-insider is complex. I believe my past experiences allowed me to gain access as an insider much easier than

a non-local or an outsider. On the other hand, since I am not part of the community and had not been to this island in many years, I encountered similar struggles to other researchers. For instance, it took many reminders for participants to complete the survey. Also, participants began to respond only when the Director of Education sent a reminder to the principals about my upcoming travel to Veritas Island to conduct the study. Thus, I refrained from revealing information to the Director when specific questions were about the participants (e.g., Who is participating in your study? Did everyone respond?).

Carducci et al, (2013) explained that interrogating myself about who I am is relevant in any inquiry. During the data collection, I found myself navigating among three roles (researcher, Filipina, and PREL employee), I learned the importance of employing trustworthiness throughout the process. The implemented strategies (e.g., reflectivity, member checks) assisted me to remain objective; however, I also learned that separating my Filipino ethnicity was not as easy. I realize masking my ethnic identity can be limiting, and in future studies, I need to address this part of me from the outset.

### **Conclusion**

In chapter 3, I provided an overview of phenomenology and outlined the instruments, the data collection, and the data analysis process involved in this study. I described ethical considerations in qualitative research such as trustworthiness, triangulation, and the use of human subjects in surveys. I concluded the chapter by explaining the role of the researcher. In chapter four, I will present my findings, followed by a discussion and implications in chapter five.

## **CHAPTER 4**

### **DATA ANALYSIS AND FINDINGS**

The aim of this study was to understand the transfer of learning process by teachers who participated in the Pacific CHILD professional development program. The exploration throughout this research allowed me to discover factors in the participants' environment, experiences and behaviors that have affected their transfer. In addition, this chapter presents a thematic approach on lessons learned from this study. Staying true to the phenomenological approach, I italicized the participants' quotes to illustrate the power of teachers' voices.

#### **Data Analysis**

In two rounds, I analyzed data through a process of organizing, taking apart, and putting data back together to make sense of the stories (Glesne, 2015; Merriam, 2009; Plano Clark & Creswell, 2010). The first round was analyzing the Teacher Background Survey prior to the semi-structured interviews. Survey responses provided insights on participants' current practices in their environment. The survey also served as a vehicle to generate questions for the semi-structured interview.

The second round included analysis of the survey in conjunction with the semi-structured interviews and focus group transcripts. In this round, the checklist and my field notes were used to triangulate the data. The second round was a much lengthier process. There were more data to work with and to synthesize. I utilized the NVivo10 qualitative data analysis software program as a way to use my time efficiently and to think through what I had collected (Jackson, 2015). NVivo 10 enabled me to store, organize, analyze and find themes related to the research questions. For instance, I imported the digital audio files into NVivo10 along with each participant's transcript. Then the data from these files were coded and later sorted into themes.

Throughout the analysis process I created memos in NVivo 10 to exercise reflexivity, create audit trails, and not lose sight of the task in front of me. Moreover, these memos were intended for later use in the discussion and results (Merriam, 2009; Roberts, 2010).

In this next section I discuss my application of the data analysis by employing a modified version of Moustakas' (1994) phenomenological research methods. Here, I give concrete examples of how the four processes of this methodology were applied. First I begin with epoche, a method to maintain my objectivity. While epoche is identified as a step, I applied this reflective process throughout the data collection and analysis process. The second step was the phenomenological reduction process, which involved coding participants' experiences and then creating composite textural descriptions. The third step involved imagination variation, which consisted of analyzing the textural descriptions and formulating composite structural descriptions. The final step was synthesizing the textural and structural composites related to the research questions.

### **Epoche**

As mentioned, epoche is a common practice in phenomenology to assist the researcher to reflect upon his/her experience in order to remain objective, and to avoid any biases or judgments of the participants or their experiences (Balls, 2009; Landreman et al., 2007; Merriam, 1998, 2009; Moustakas, 1994; Plano Clark & Creswell, 2010; Schram, 2003). Implementing epoche took place at various times and forms in this study. Before and after each interview I recorded my thoughts on a digital recorder or in writing. This exercise forced me to release any biases and think critically of my role as a researcher. Some refer to this process as "reflexivity" (Glesne, 2015; Merriam, 2009). Part of the researcher's role is to apply culturally appropriate ways to make bridges and connect with participants (Glesne, 2015). For example, I was much

more anxious at the start of my interviews with school principals than with classroom teachers. Principals are influential in the local culture. I knew the delivery of my questions could potentially offend or create discomfort. I started my interviews by expressing congratulatory remarks about their promotion, and asked how they were feeling personally and professionally before easing into the interview questions.

During the data analysis phase I reviewed my assumptions against the stories of the participants and other data as another form of trustworthiness. Moustakas (1994) asserted that epoche is to be “transparent to ourselves...so that we may see with new eyes in a naïve and completely open manner” (p. 86). One of those moments occurred on my first day on island. I wrote,

*According to the data (survey), all three participants are confident in their knowledge and skills with implementing Pacific CHILD effectively. That is incredible. I am trying to contain my excitement about teachers’ perceived knowledge and skills. I need artifacts to truly feel confident that their knowledge and instructional practices have been sustained, and/or possibly improved.*

I realized excerpts such as this focused on my lived experiences and feelings instead of the participants. The transparency of my wanting Pacific CHILD to be transferred was clear in the phrase “*trying to contain my excitement,*” Since these surveys were sent before the interviews, the follow-up sentence, “*I need artifacts to truly feel confident that their knowledge and instructional practices have been sustained,*” reverted me to my position as the researcher and avoided any emotions influencing my judgments.

The audit trails from the data provided reassurance that I was exercising trustworthiness (Glesne, 2015; Merriam, 2009). For instance, one participant reported on the survey as frequently implementing differentiated instruction. When I examined the interview notes and the checklist, the responses were contradictory. I realized she rated herself much higher on the survey. The multiple sources of data allowed me to seek further clarification about these inconsistencies.

In addition, the application of horizontalization (participants' verbatim statements) was applied during the data analysis to avoid any partiality that might privilege my voice over the participants (Turner & Fozdar, 2010). Discussing my analysis with my dissertation chair was another way I had captured the essence of the participants. She assisted with keeping me focused on pertinent information related to the research. For example, during one of the focus groups there was an extensive conversation on the definition of being "local." While the information was valuable, my advisor reiterated the need to focus on data related to the research questions. At the same time, this idea of *being local* opened the possibility of new themes and the value of unrelated conversations as bridges to other topics that became relevant, which I discuss in chapter 5.

### **Phenomenological Reduction**

During the phenomenological reduction phase, the InVivo coding method (or verbatim coding) was utilized to acknowledge participants' voices and their lived experiences (Saldana, 2013). Key phrases from the interviews and focus groups transcripts were coded verbatim. Using the technique of horizontalization, where each statement was of equal value, these phrases were then clustered and given an "invariant constituent," or unique qualities, which flag aspects of the lived experience that are bounded to the individual (Moustakas, 1994). I eliminated any

invariant constituent that was not related to the research questions. One example was the participants' viewpoints about parents and the community members. The comments they had expressed about parents were related to all academic subjects and had no effect on the participants' abilities to transfer their learning and were eliminated. At the end of my first round of using InVivo coding, there were thirty-five invariant constituents.

The second round of analysis using pattern coding or clustering by similar qualities took place (Saldana, 2013). At this time, I discovered that some of the invariant constituents could be combined, or deleted because they were not as significant to the research question as I initially thought during the first round of coding. For instance, I combined phrases related to Pacific CHILD and identified it as *perceptions of experience in Pacific CHILD*. Merriam (2009) called data reduction as “a period of intensive analysis when tentative findings are substantiated, revised, and reconfigured” (p. 178). After a second round of using InVivo coding, twenty-five invariant constituents were identified (see Table 5).

Table 5. Twenty-five invariant constituents of participants' lived experiences (listed in alphabetical order)

1. Access to resources
2. Administrators
3. Colleagues
4. External professional development providers
5. Impact on students
6. Other initiatives
7. Participation in other professional development
8. Perception of experience in Pacific CHILD
9. Reasons for no transfer
10. Request for more professional development
11. Support after professional development
12. Teacher as professionals
13. Teacher efficacy
14. Teacher voice
15. Testing
16. Time
17. Transfer after Pacific CHILD but not in current role
18. Transfer without connecting to Pacific CHILD
19. Transfer: cognitively-rich environment
20. Transfer: differentiated instruction
21. Transfer: expository text
22. Transfer: interactive tasks
23. Transfer: question generation
24. Transfer: text structure, text features
25. Transfer: vocabulary

### **Composite Textural Descriptions**

Textural descriptions provide an account of *what* happened during the phenomenon based on the invariant constituent, or unique qualities, of the experience (Moustakas, 1994). These include verbatim examples collected from the data. Ideally, I would create individual textural descriptions about each participant's experience. However, I modified this step to protect the privacy of my participants. In an island community with a small number of participants, these individual textural descriptions can quickly reveal their identity. I used descriptive statistics



from the survey results (Appendix H) and direct quotations from the participants. I did not cite the person for any direct quotes as another form of protection. Instead, I constructed composite textural descriptions for the entire group. In this process, I examined the twenty-five invariant constituents or participants' meaningful experiences and then clustered them into four themes. These themes were labeled (1) types of transfer practices, (2) barriers and successes, (3) teacher learner identity, and (4) collaboration. The following is a composite textural description of each theme and invariant constituents based on *what* the participants reported in their journey after Pacific CHILD.

**Theme 1: Types of transfer practices.** Data revealed that participants had transferred nine different practices to varying degrees (see Table 6).

***Transfer of vocabulary.*** Many felt confident in their ability to teach vocabulary. According to the survey results, 67% of the participants reported that they were very effective in teaching vocabulary explicitly, while 33% reported that they were somewhat effective. During one of the focus groups, one participant shared, “*Among all the teaching strategies that I really, really value is vocabulary instruction.*”

In regard to classroom practices, 44% of the participants shared that vocabulary is explicitly taught in English language arts one to two times per day; 11% taught vocabulary one to two times per week; 11% taught vocabulary one to two times per month; 22% reported that vocabulary is never or rarely taught explicitly; and 11% reported that this does not apply to the current context. Both participants who reported that vocabulary *is never or rarely taught explicitly* were in classrooms settings where vocabulary instruction was not a priority.

The collected vocabulary artifacts were content and grade level specific. For example, in a seventh-grade social studies classroom, there was a word wall and student work related to

economics and types of government. In a fifth grade classroom, students were studying about Polynesia. Evidence was found in their student projects and in their learning notebooks. For instance, students learned vocabulary by creating maps and timelines.

Table 6: Theme 1, Transfer practices related to different aspects from Pacific CHILD

Theme 1: Types of Transfer Practices	<p>Invariant constituents</p> <ul style="list-style-type: none"> <li>• Transfer: vocabulary</li> <li>• Transfer: text structure, text features</li> <li>• Transfer: interactive tasks</li> <li>• Transfer after Pacific CHILD not in current position</li> <li>• Transfer without connecting to Pacific CHILD</li> <li>• Transfer: differentiated instruction</li> <li>• Transfer: cognitively-rich environment</li> <li>• Transfer: expository text</li> <li>• Transfer: question generation</li> </ul>
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***Transfer of text structure and text features.*** Based on survey results, 67% reported that they were very effective in teaching text structure, while 22% reported that they were somewhat effective. Sixty-six percent reported that they were very effective in using text features, 22% reported not very effective, and 11% didn't know. In regard to classroom practices, it was evident that more instruction on text structure occurred than text features. Some classroom artifacts of text structures included a student matrix that compared the U.S. House of Representatives and the Senate, a cause-and-effect teacher anchor chart with different signal words (e.g., “*as a result*,” “*so*”), and students’ work that demonstrated their understanding of sequencing based on the life cycle of a spider.

When reporting on text features, 67% felt they were very effective and 22% reported not very effective, and 11% responded *don’t know*. The artifacts on text features were mostly

anchor charts that served as reference tools for students. For instance in one classroom, a chart paper with two columns was hanging on the wall. The heading of the first column was labeled *text features* (e.g., bold and highlight fonts) and the second column heading was labeled *how to help me*, and included a student-friendly definition (e.g., “to catch my attention,” “need to pay attention”). The participant elaborated that posted anchor charts gave reminders to her students about using different strategies to aid in their comprehension.

***Transfer on interactive tasks.*** The results from the survey showed that 56% reported being very effective in incorporating interactive tasks, 22% reported being somewhat effective, and 22% reported being not very effective. In regard to classroom practices, a couple of artifacts were students’ group work solving math problems, and a group work chart that included job titles such as facilitator, recorder, researcher, artists, with each student’s name next to each role. One participant explained,

*There’s always an interactive task, [sic] it’s not all paper, pencil, and copying type of lessons anymore. We try to make sure there is cooperative learning within each lesson. Students are more accountable of what they’re supposed to learn. They get to experience peer tutoring. I guess there is more hands-on now than before.*

***Transfer after Pacific CHILD but not in current position.*** Only two of eleven participants are in the same school and grade level as they were during their involvement with Pacific CHILD. As evidence of transfer of learning, five participants were asked by their principals to conduct workshops for other faculty members at their school after Pacific CHILD had ended. Dates of these workshops varied from a year after Pacific CHILD ended to as recently as the current school year. At the time of this study, only one principal and one vice

principal had extensive knowledge of Pacific CHILD. These two administrators were former classroom teachers who had participated in Pacific CHILD.

***Transfer practices without connecting to Pacific CHILD.*** Four participants mentioned current practices that reflected strategies delivered during Pacific CHILD. For instance, one participant mentioned how students worked in small groups and took turns asking and answering questions. These were strategies related to the question generation or interactive tasks that were implemented during Pacific CHILD. But these participants did not connect their prior learning to current practices.

***Transfer of differentiated instruction.*** According to the survey results, 44% reported they were very effective in their ability to differentiate instruction, 33% reported they were somewhat effective, and 22% reported being not effective at all. In regard to classroom practices the participants explained some of the challenges included their lack of ability, time and resources. One participant continues to try, but admitted, “*I’m not very good at it.*” Flexible grouping was one aspect of differentiated instruction that was commonly used among participants. This involves assigning students to work in small groups based on a specific focus for a short period of time (Tomlinson, 1999). Based on the data results, 22% reported being very effective and 56% reported somewhat effective in flexible grouping. One participant showed evidence of students work on learning how to construct bar graphs using different number values.

Participants also disclosed other related differentiated strategies. Sixty-eight per cent reported simplifying language for students with lower English proficiency about 1-2 times per day, and 56% provided below grade level materials about 1-2 times per day. In one example,

one participant used sentence frames to support students' language during math (e.g., There are \_\_\_ basketballs).

***Transfer of cognitively-rich environments.*** Although 56% of the participants reported on the survey that they were very effective in facilitating a cognitively-rich environment in their classroom, this was the least-used strategy among the participants. Cognitively-rich environments offer a wide variety of opportunities for students to learn through literacy, print, experiential, and community-related activities (Pacific Resources for Education and Learning, 2008). Only one component, creating a print-rich environment, was evident in the classroom. Students' work and reference tools were displayed in the classroom; however, it was hard to determine if students used any of these tools. One participant explained creating an experience-rich environment, where students engaged in hands-on learning based on a topic, was challenging due to limited time and resources. She had minimal access to artifacts or replicas related to the subject matter, and due to constraints with instructional time could not provide opportunities to carry out experiments.

***Transfer of using expository text.*** Expository text was the primary literacy genre used in Pacific CHILD. At the time, participants expressed having difficulty finding these texts. PREL staff assisted with increasing access to these text, but did not emphasize expository text as a survey item (Abe et. al., 2017). As a result, when I had modified the survey, I too, overlooked that an item about expository text was missing.

During the data collection process for this current study, six of the eleven participants brought up their continued use of expository texts, a required genre during their involvement in Pacific CHILD. Some said that the *Pacific CHILD Teacher's Manual* continued to be a resource for them. One participant revealed, "*I always find myself going back to the [Pacific CHILD]*

*binder and I used a lot of the articles that they provided, the short articles.”* Another participant explained,

*I use it [Pacific CHILD binder] to find some of the passages that I’ve use [sic] before that targets our current Common Core Standards. It’s kind of hard to use the ones we have in the basal reader, the curriculum that we’re using.*

**Transfer of question generation.** Question generation involves students asking and answering questions based on implicit and explicit information from the text (Pacific Resources for Education and Learning, 2008). During Pacific CHILD, a modification was made at the end of the first year of implementation (Abe et al., 2012). This change involved switching to broader levels of questioning from the literal, inferential, and evaluative levels of questioning to engaging students with the questioning process. Similarly, I overlooked the items related to questioning on the survey.

While teachers identified the use of questioning, most of these questions were teacher-generated, not student-generated, and mostly at the recall and application levels. When asked about providing opportunities for students to use higher-order thinking skills, 57% reported 1-2 times per day, 11 % reported 1-2 times per week, 22% doing so at 1-2 times per month.

When asked to elaborate about the implementation of question generation, one participant who teaches in the lower elementary grades explained, *“I am using Question Generation in the morning for my journal... I am helping students to turn statements into questions. It’s hard for them.”* Another participant showed me students’ work consisting of questioning their peers on their application of mathematical concepts (e.g., *“Is your triangle a right triangle?” “How will you solve [the] Pythagorean theorem using an algebraic expression?”*). These teachers were asking questions to promote higher-order thinking.

**Theme 2: Barriers and successes.** Barriers and success were factors that affected transfer of learning. In total, seven factors were identified (see Table 7).

Table 7: Theme 2, Barriers and successes affecting transfer

Theme 2: Barriers and Challenges	Invariant constituents <ul style="list-style-type: none"> <li>• Role in transfer</li> <li>• Impact on students</li> <li>• External professional development</li> <li>• Other initiatives</li> <li>• Time</li> <li>• Access to resources</li> <li>• Testing</li> </ul>
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***Role in transfer.*** Participants' roles were influential with the transfer of learning. Participants who continued to provide classroom instruction had an easier time to transfer their learning. Those in non-classroom roles did not have an environment that allowed opportunities for them to extend their learning. For instance, two participants who were now tutors explained that the instructional focus in the tutorial program was on fluency and decoding. One participant explained that teaching text structure, vocabulary, and question generation to her students would be overwhelming, because these students cannot read effectively. Administrators also expressed that their roles limited their abilities to transfer because they did not provide classroom instruction.

***Impact on students.*** Participants described student performance as an indicator to continue their transfer from Pacific CHILD. Data from test scores were a common form of documentation. One participant shared her reaction when finding out the students' progress on the text structure benchmark from the statewide assessment: "*When the results came, I was*

*jumping up and down. Of my 24 students, I had 22 that were proficient or advanced in that area.”* She further explained,

*I guess [the] reply from the kids, it made me go, maybe gosh I like this... [sic] I like that [text structure] working and this is the kind of results that I want out of my students, and to know they feel confident, and they know what to do.*

When participants noticed students were struggling, they often retreated from the transfer process. Even though participants had prior knowledge that a strategy could be effective, they chose not to implement it because results were not quick enough. One participant explained that when she was a reading specialist, her English language learners struggled with forming questions and were reading below grade level. Although she knew giving access to language would increase their English skills, she felt it was too challenging, and abandoned using question generation.

***External professional development.*** Involvement in other professional development activities allowed some participants to make connections with Pacific CHILD, making transfer of learning a little easier. For instance, an initiative called Classroom Instruction that Works (Dean, Hubbell, Pitler, & Stone, 2012) had parallels with Pacific CHILD. Others felt that other work (e.g., 21<sup>st</sup> Century Learning) with external providers had no connection and made transfer a challenge.

***Time.*** Participants expressed reasons related to time such as the lack of, or time-consuming tasks made transfer of learning difficult. For instance, one participant explained,

*So like differentiated instruction, I know it’s a need, but with all the testing that we’ve had and all the changes in the curriculum, it’s kind of time-consuming for us to be*



*planning and preparing everything. I'm just getting a little piece at a time. Or I'll cover this for now and maybe later on I'll do something, but usually I don't get to that.*

**Access to resources.** The amount of resources readily available depended on the participants' contexts. One participant continued to struggle with access to resources. She is now teaching in a different grade level and explained, "*Right now, we don't have many resources in the lower grades. I do my own research to find text. There are not many resources in social studies or science.*" In comparison, another participant from a different school explained that they had an abundance of resources and had an easier time to transfer their learning.

**Testing.** Testing was also a barrier to transfer. Participants described the evolution of testing from switching tests—for example, from the Stanford Achievement Test to Act Aspire—increased the number of testing windows, or the time frame when students were required to take the test. More testing windows meant less time was dedicated to instruction. When the Stanford Achievement Test was used, teachers were assigned to a single time frame to administer the test, such as the third week in May. With the new test, Act Aspire, teachers were required to administer it in three different time frames. For instance, one teacher shared that students were tested in March, April, and May. They expressed that testing made them feel overwhelmed and affected their ability to transfer. One participant commented,

*Sometimes, it's hard and sometimes I forget to incorporate it [Pacific CHILD]... because it's just so many things being put on our plate. This year, literally, I would say I am overwhelmed because assessments, after assessments, after assessments. And I'm still not done with assessments. So, I'm like stressing out and trying to finish report cards, final exams and all that other stuff. This year is just overwhelming.*

**Theme 3: Teacher Learner Identity.** Teacher learner identity consisted of participants' perceptions of themselves as educators and the profession. There were seven invariant constituents in this theme (see Table 8).

Table 8: *Theme 3, Teacher learner identity*

Theme 3: Teacher learner identity	Invariant constituents <ul style="list-style-type: none"> <li>• Perceptions of experience in Pacific CHILD</li> <li>• Participation in related professional development</li> <li>• Teacher efficacy</li> <li>• Teacher as professional</li> <li>• Eagerness to learn</li> <li>• Teacher voice</li> <li>• Learning support after Pacific CHILD</li> </ul>
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***Perception of experience in Pacific CHILD.*** Any experiences that were perceived as valuable from Pacific CHILD were transferred. On the other hand, any experiences that were seen as not valuable were not transferred. For instance, one participant explained how her instruction had improved dramatically. She shared,

*In my case, it really helps me a lot. I've already shared with you that on my recent SIOP observation I aced the observation. I got flat 4's [score on the observation protocol] (chuckles). [Principal] was very impressed in what she saw in my class as a matter of fact, I was featured on the video. [sic]*

Another participant admitted to not transferring any practices from Pacific CHILD. Through our conversations she admitted never wanting to be part of the professional development from the beginning. At the time she felt overwhelmed with her daily teaching responsibilities. She believed that her mandated participation influenced her negative perception

of Pacific CHILD. Six years later, she is still resentful, but admitted to learning from the experience. She explained,

*I really didn't want to be in the program. I tried to get out and tried to get out.... It was mandated for us at the time. We didn't have a choice. (pause) But then... for me, it really helped me a lot... in my teaching.*

**Participation in related professional development.** Professional development content or activities that were similar to Pacific CHILD assisted with the transfer process. One participant attended a workshop on differentiated instruction. She explained,

*I almost felt like, wow, I came here with an open mind thinking I'm going to [do] something new, but in fact, it's validating what I'm doing already. I think it just kind of gave more support to what I'm already doing and what I've learned from that opportunity I had.*

In contrast, content or activities that were unrelated did not transfer as easily. For example, participants who are now administrators described that the majority of their professional development emphasizes leadership skills and management, which was not a part of their learning during Pacific CHILD.

**Teacher Efficacy.** Transfer was easier when participants felt confident in their knowledge and skills from Pacific CHILD. On the survey, 56% reported being very effective with implementing the Pacific CHILD components, 22% believed they were somewhat effective, and 22% reported not very effective. One participant explained,

*I think at the end ...I was confident. We felt confident. I mean, the group when we would get together, we were confident towards the end. We got this, and being a first-year*

*teacher and having, feeling confident at that end, it gave the drive to want to continue to use those strategies.*

When participants were not confident the transfer did not occur. For instance, one participant shared, “*My grade level teachers were not familiar with P-Child and teaching them all the components seemed a little overwhelming for me.*”

***Teacher as professional.*** Many participants felt that mentoring was an important aspect in treating them as professionals. One participant explained,

*It was a very good opportunity and I am glad I was able to participate in that. I believe I was a first-year teacher at that time and it had a really strong mentoring support system and a lot of the professional development opportunities. Now looking back, teachers do not have the professional development that are at that same level.*

***Eagerness to learn.*** Nine participants shared information on possible content and processes that might help them grow as a professional educator. Five participants shared that they would like to have a follow up session of Pacific CHILD. One participant explained,

*I would like for P-CHILD to have some type of workshop or training for those who have gone through it. We can try and work together as teachers in our prospective grade level and come up with lessons and activities that apply and target the different strategies and skills.*

One participant made it clear that she would be involved with short-term activities related to Pacific CHILD as a refresher, but would not commit to two years.

***Teacher's voice.*** During our conversations, participants described the importance of their involvement when making decisions on the kinds of professional development they would like to

receive. They felt if their input was received, they were more likely to transfer their learning into their context. One participant who is now an administrator explained,

*If we were going to provide them [teachers] training, then train them depending by [sic] their grade level, where do they need the most, in terms of needs with instruction with their students?*

Another participant shared,

*I think a lot of times with professional development, is that you go some place and it's not anything that we value. So it's nothing that we value at all. We're just there because it's two days and we have to attend those sessions. First of all, it has to have something of value. If there's no value to it all, it's kind of like nonsense to [be] there.*

**Learning support after Pacific CHILD.** All of the participants shared that no support was provided by their education department, or by PREL staff, to assist with transfer into their context immediately after Pacific CHILD ended in May 2009. However, most participants expressed that they were not expecting any kind of support. One participant shared how she managed on her own: *"I just went ahead and I just go into the binder, read it. I try to refresh myself with the contents. I try to find other stuff to help me tie in with what I had in the Pacific CHILD binder."*

Another participant mentioned that since no one was providing support to Pacific CHILD, this made it easier for transfer not to occur.

**Theme 4: Collaboration.** Colleagues and administrators were two invariant constituents in this theme (see Table 9). Although the majority of the participants had a positive

rapport with colleagues and their administrators, most of their collaboration had little connection to Pacific CHILD.

Table 9: Theme 4, *Collaboration*

Theme 4: Collaboration	Invariant constituents
	<ul style="list-style-type: none"> <li>• Colleagues</li> <li>• Administrators</li> </ul>

***Colleagues.*** Working with colleagues was the most referenced invariant constituent in this theme. According to survey results, 56% reported that collegiality among faculty was not a challenge, 33% reported that it was a minor challenge, and 11% reported that it did not apply to their context/role. Collegiality varied among schools and the participants' current roles. Those with collaborative environments were able to transfer their learning to an extent. For instance, one participant explained, "*We have a very good family. We are so positive.*" Then she later explained, "*We have regular meetings, by departments, and by grade levels.*" For this participant, her current administrator had been involved in and had strong knowledge about Pacific CHILD. The principal also recognized some teachers did not have the same experience. She gave permission for participants to demonstrate lessons using the strategies to any interested teachers.

In contrast, those who did not have strong collaboration or colleagues who did not participate in Pacific CHILD found transferring their learning more challenging. One participant shared,

*We meet but we don't collaborate. Even though every year that's the first thing I always ask in our first week. Can we come together? Can we meet? It's hard. It's hard when we have three against [me] [points to self].*

**Administrators.** According to survey results, 77% reported that administrative support was not a challenge, 11% reported that it was a minor challenge, and 11% reported that it did not apply to their context/role. One participant expressed that her principal is, *"Very, very helpful and very, very accommodating. If we need something, then we just have to tell her and she would provide it."* She also pointed out that the principal asked her and a colleague to conduct two workshops on vocabulary instruction for the entire faculty. The data also supported participants' claims that administrative support occurred in other school-wide efforts, not just with their implementation of Pacific CHILD. For a few, Pacific CHILD received less support than the other initiatives.

To sum up, in this section I provided an overview of the data analysis process. Epoche was the first step to assist with maintaining objectivity. The second step, the phenomenological reduction process of the data, revealed twenty-five invariant constituents that were categorized into four themes: (1) types of transfer practices, (2) barriers and challenges, (3) teacher learner identity, and (4) collaboration. The composite textural descriptions illustrated verbatim examples of what participants' reported on their journey after Pacific CHILD. The four themes established commonalities or what the group experienced as a whole. Moustakas (1994) posited that constructing these textural qualities enables the researcher to better understand the phenomenon. In the next section, the technique of imaginative variation provides description on how the participants felt about their experiences.

### Imaginative Variation

The next step in the phenomenological process was applying imaginative variation. Here, I composed individual structural themes for each participant and then a composite structural description for the group. Imaginative variation occurs when the researcher seeks *how* the participants felt based on existing structural conditions such as time, relationships, or causality (Moustakas, 1994). The researcher's goal is to understand the perspectives from various frames of reference of the participants. By using the textural descriptions from the phenomenological reduction process, I composed individual structural descriptions that gave "a vivid account of the underlying dynamics of the experience" (Moustakas, 1994, p. 135). Key words were used to describe each participants' experience (see Table 10). To protect participants' identity, I applied pseudonyms and renamed identifiable school information (e.g., grade level, position).

Table 10. Participants' Lived Experiences

Participant	Structural Theme
Bianca	Empowerment
Brittany	Adjustment and fluctuation
Dana	Gloomy
Diana	Methodical and cautious
Joanna	Indifferent and tolerable
Mary	Conflicted
Nina and Oscar	Messengers
Serena	Driven
Tatiana	Overwhelmed
Theresa	Unstable and resilient



## **Bianca**

Bianca is no longer in the same teaching position and school from her participation in Pacific CHILD. Now a college instructor, her journey after can be depicted with examples of empowerment. She explained,

*Because of my experience, it's easier for me to transfer that [Pacific CHILD] knowledge and bring that into my classrooms and help build these pre-service teachers who I know will go into the schools and use those same strategies.*

Fortunately, Bianca works in a supportive environment where educators have opportunities to make decisions and collaborate. The group dynamics in her current situation were similar to her school group during Pacific CHILD. She and her colleagues have similar educational philosophies and a sense of responsibility for addressing every student's learning needs. For instance, Bianca mentors her college students similarly to her experience in Pacific CHILD. She recounted, *"I got the opportunity [to] see really good mentoring and to participate in that and I wish... all teachers had that opportunity."* She gave examples, such as creating a safe environment, and telling her students a good mentoring relationship is *"based on communication."* She felt PREL staff had mentored and communicated well with her.

Bianca is also cognizant of the different professional development opportunities for teachers on Veritas Island. While she knows outside expertise is highly valued, she believes the school system does not *"build it [professional development programs] to where it's that supportive."* She advocates for ongoing activities that help teachers "not feel the stress of meeting every need" throughout the year.

## Brittany

Brittany's journey can be described as one of adjustment and fluctuation. As a classroom teacher, Brittany has worked in two other grade levels since her participation in Pacific CHILD. Brittany jovially characterizes these experiences as "*stressful*." At the time of the interview she was completing her first year of teaching in the second grade. She depicted the convergence of learning content and working with colleagues in a new grade level as "*kind of overwhelming for me to throw everything in and be really good at everything at one time because it's my first year... [and it's] time-consuming*."

Evidence suggests minimal transfer had occurred in Brittany's case. The constant change affected her in two ways. First, none of her colleagues had participated in Pacific CHILD, and her ability to build on existing knowledge collaboratively became a challenge. She expressed that her colleagues "*weren't part of the program, so it [Pacific CHILD] gets pushed to the back when I share what I can with the group*." Also, her current administrators expected grade-level consistency with curricula and instruction, which she deciphered as meaning, "*don't want to deviate*," "*synch all our lessons*" and "*teaching the same way*."

Secondly, the elimination of PREL's onsite support affected Brittany's efficacy. She shared, "*I know when [PREL staff] was showing it to us it was like, I know this, I got this. But after that (sighs), it's kind of hard being alone and planning everything (chuckles)*." Other indicators about her transfer of learning process included phrases such as "*with just me [doing things] by myself, I'm not so sure if I'm doing some of the things the right way*," "*I guess if I really plan on doing it [Pacific CHILD], I would be effective*," or "*I'm sure if I opened my binder, I would remember*." It appears that Brittany's efficacy is validated when environmental supports, such as having collegial conversations about her teaching practices, are made available.

To further exasperate Brittany's situation of adjusting and fluctuating, she would transfer to another position in the following school year.

### **Dana**

Dana is a tutor. Her attitude, environment, and experience were contributing factors affecting her transfer of learning process that started before her participation. Her journey can be described as gloomy. She felt another teacher would have benefited from the learning, and could have sustained any efforts since Dana was planning to retire in a few years. However, Dana's principal denied her request to be excluded from Pacific CHILD. Although Dana indicated that Pacific CHILD was beneficial to her, she continues to have a negative perception due to the mandated participation in the program. Dana's prior experience was in social work, and she also mentioned that not being "*teacher trained*" (as opposed to being trained as a social worker) might have contributed toward the experience. "*I felt out of place with the training because I didn't have the concepts that people that are trained in education have.*"

### **Diana**

Diana is a classroom teacher. She no longer teaches in the same grade level but teaches at the same school. Her journey after can be depicted as methodical and cautious. She resents mandated professional development, but explained Pacific CHILD was, "*The best professional development I had ever had because it was so hands-on.*" Pacific CHILD was so intense that afterward Diana stopped her implementation. However, she realized that by not implementing the strategies, her students struggled with comprehension when compared to her previous students. Therefore, Diana implements parts of Pacific CHILD that were manageable for her planning, and this has a positive impact on student learning. Fortunately, her students read expository text daily, which made the transferring of vocabulary strategies and text structure

easier. In her classroom there were teacher and student artifacts displayed around the room. She also works in a collaborative environment where faculty and administrators are supportive of one another, and resources are readily available. Both environmental variables have made transfer of learning easier for her.

Her intense experience in Pacific CHILD helped her to formulate a critical definition of professional development. She remained cautious of any professional development, and viewed this as not teacher choice but as directives given by the state educational office. In Diana's eyes, professional development is action-oriented, where providers "*should come into the classroom*". This perspective was developed based on her experience in Pacific CHILD, where PREL staff was a constant presence in her classroom and were working with students.

Diana despised the training-of-trainers model, where a selected group attends workshops and conferences on the U.S. mainland. They then return to Veritas Island and disseminate information by lecturing. Diana then elaborated that these groups of teachers should model and show what they had learned rather than transmitting information, which she refers to as "*sharing*" and not "*training*." She also expressed frustration when speaking about the constant changes in professional development happening on Veritas Island. There has been a huge emphasis on language arts and math. Diana noted that she has yet to participate in a professional development solely on her subject matter of science. At the time of this study, no funds had been allocated to hire a science specialist, and there were no content area standards.

### **Joanna**

Joanna is currently teaching in the same grade and same school as she did during Pacific CHILD. Her journey afterwards can be described as indifferent and tolerable. When reflecting back upon her experiences in Pacific CHILD, she appreciated the modeling that was done by

PREL staff and explicit teaching of vocabulary. This allowed her to continue teaching vocabulary as evident by the artifacts in her classroom. She transferred her learning by continuing to implement strategies with expository text during the science and social studies instructional blocks. For instance, she showed students writing with rich vocabulary to describe the different geographical locations of Polynesia and Micronesia. Although her artifacts and verbal explanations showed the transfer of other strategies (e.g., differentiated instruction, interactive tasks), Joanna did not make those connections to her present work.

The environment was an influence in her ability to transfer. Despite Joanna remaining in the same grade level and school, her colleagues and administrators affected her journey afterwards. She recalls the former principal and colleagues being staunch supporters of Pacific CHILD. She expressed, “[*W*]e were doing it religiously.” But when the principal and her grade-level colleagues transferred out of the school, it became challenging for Joanna to sustain her efforts. The current school structure leaves minimal time for the grade level to collaborate. Testing and a scripted reading curriculum were other structural variables in the environment that affected her transfer of learning.

### **Mary**

Mary is a tutor. Although she works full-time with 54 students, she does not refer to herself as a teacher. Due to environmental conditions, her journey afterwards can be described as conflicted. Mary loved Pacific CHILD and would like to implement it on a consistent basis. However, her role as a tutor dictates what she can and cannot transfer from Pacific CHILD. All of her students are reading below grade level and need extra support. Mary’s colleagues also suggest specific targets (e.g., grammar) for her to work on with students. Thus, her instructional plans are modified on an almost-daily basis.

Mary's primary goal is improving students' reading proficiency. This sole focus is where the tension exists for Mary. She knows vocabulary can enhance students' reading progress. The majority of her students struggle with decoding, and her vocabulary instruction tends to focus on high-frequency words to build students' reading fluency. She also mentioned that students were required to take an Accelerated Reading test each month as they were expected to read a certain amount of words. At the time of this study, Mary proudly shared that her students contributed almost three million words toward the school's reading goal.

In our conversations she proudly shared artifacts in text structure, text features, and vocabulary that were displayed in her classroom. Displaying student work is a small component of cognitively-rich environments, another strategy from Pacific CHILD, where student work showcases learning in the classroom.

Time constraints and students' lack of motivation were other factors that affected her ability to transfer. Mary explained that sometimes she only sees the students once or twice a week. To add to this challenge, some students are apprehensive to read and unmotivated to complete any work.

### **Nina and Oscar**

Nina and Oscar are both administrators. I combined their profiles because of their striking similarities. Their journey after can be described as active messengers. The environment and frequent position changes affected their transfer. After Pacific CHILD they worked in other resource positions (e.g., reading resource specialist, ELL specialist) before their current roles. They both valued Pacific CHILD and felt it enhanced their success with their students. For instance, Oscar mentioned that positive student impact was one reason for

transferring practices. He shared enthusiastically the proficient ratings his students received on the statewide exam when he was a classroom teacher.

As the distance widened from working with students, it became difficult for both these participants to continue actual work with Pacific CHILD. At the time of this study Nina and Oscar were, as mentioned above, the *messengers* rather than the doers. For instance, Oscar advised his teachers to use different vocabulary strategies (e.g., Frayer model) that he had learned in Pacific CHILD. He also looked for artifacts in the classroom to see if teachers were applying the strategy. For both, the Pacific CHILD binder remains a valuable resource from which they have shared articles with their teachers.

Another example was applying the coaching experiences from Pacific CHILD. Both used a similar process of pre-conference, observation, and post-conference. This included asking teachers for evidence of student work as a vehicle to discuss instructional practices and teacher impact. Nina mentioned directing the conversation based on the student work with teachers was less intrusive. She learned this coaching strategy from Pacific CHILD.

Oscar compared various professional development activities and concluded, “*There's [sic] not really any new strategies out there,*” but emphasized these were research-based practices that other programs utilize. For instance, he connected Pacific CHILD strategies with those from the “6 + 1 Traits of Writing” and SIOP. As an administrator, Oscar felt capable of helping his teachers bridge their learning from these sessions into their classroom. He explained that sometimes transfer is not easy for his teachers because of the directives from the state level, which he had no control of.

When reflecting on the professional development designs, Nina and Oscar believe contextualizing the program is critical. Both have a large number of English-language learners

(ELL), special-needs students and students with behavioral issues. They expressed that the departments' initiatives do not always align with their contexts. They would like to see each grade level receive training on their current needs instead of doing a mass training for everyone, a common practice. Both felt the lesson demonstration was a powerful activity that contextualized teacher and student learning in the classroom. They appreciated the follow-up activities from PREL and wished external providers would do the same. Nina shared an example: *"We have to use Achieve 3000. A lady came in here, trained us for two days on how to use the software and that's it. We used it."* After those two days, the trainer did not return for a follow-up visit. Nina mentioned that some external providers should be held more accountable with ensuring all attendees understood the services provided. She also mentioned the state specialists are responsible to enforce the accountability to the external providers.

### **Serena**

Serena is a classroom teacher. Although she no longer teaches language arts, Serena found a way to transfer her learning to a new content area and grade level. Her journey afterwards can be described as driven. Factors in her environment, attitude, and behavior were instrumental in the transfer process. Serena had a supportive principal who believed in empowering teachers. On two separate occasions, the principal asked Serena and her colleague, who also participated in Pacific CHILD, to deliver professional development sessions on vocabulary instruction for the entire faculty.

As a result of Pacific CHILD, Serena's teacher efficacy increased. She attributed this change to students' behaviors. She used phrases such as, *"I've seen results from my students,"* and *"It's better than the other teaching strategies that I have encountered so far."* Part of the program contributed to Serena's knowledge of her students and her ability to adjust her



instructional practices to meet their needs. She explained, *“When I see students fail, I see myself a failure also.”*

The majority of her students are ELLs and need extensive support with vocabulary. Her belief is that students *“should understand first the mathematical concepts... and then, the only way for them to... learn it better is if they understand the vocabularies involved.”* In her classroom many artifacts were supporting her transfer from Pacific CHILD. For instance, students’ work reflected their understanding of comparing rational and irrational numbers, posing questions to one another regarding left, right, and obtuse triangle. Anchor charts with sentence starters were also used to help students use the language of math when communicating.

However, mandated professional development is a source of tension for Serena. She felt overwhelmed during Pacific CHILD and resented being forced to participate. Now, she recognized that the ongoing support from PREL and her long-term involvement with the organization led her to become a better teacher. She expressed that professional development nowadays has no follow-through. She felt that teachers often return to their classroom and do not implement any of the information delivered. Serena also questioned the lack of accountability on behalf of trainers. She felt if external providers do not follow up with teachers, then these providers are not doing their jobs. Serena also mentioned that her participation in Pacific CHILD had boosted her confidence. She has taken on leadership roles at her school and examines school and statewide initiatives with a critical lens.

### **Tatiana**

Tatiana is a classroom teacher. She was reluctant to participate in this study and apprehensive to share any information about her experiences after Pacific CHILD. I soon learned that part of that apprehension was related to the lack of transfer and her constant feeling

of being overwhelmed. Most of her reasons related to variables in the environment, such as feeling overextended and facing a lack of collaboration among faculty. Tatiana used phrases such as “*stressing out*”, “*struggles*”, “*things on our plate*”, and “*too much*” to describe her feeling of being overwhelmed. She also felt teachers at her school were being “*micromanaged*”, and wished they could just teach without being obligated to fulfill other responsibilities like serving on committees and preparing for the school’s accreditation. Tatiana has a strong desire to collaborate with colleagues. However, none of her colleagues were willing to share ideas in the same manner as she experienced during Pacific CHILD. Although Tatiana sought assistance from her administrators as an attempt to get her colleagues to work together, nothing came to fruition. She expressed interest in possibly being involved with a follow-up session of Pacific CHILD to learn what strategies are working or not working with other Pacific CHILD participants.

### **Theresa**

Theresa is a classroom teacher. She is teaching at a different school and in a new grade level. Her journey afterwards can be described as unstable and resilient. Since Pacific CHILD had ended, Theresa has worked at three different schools, in different grade levels, and on two separate islands. Theresa's attitude, however, is amazingly optimistic. Despite all the moving around, her passion for teaching and helping children learn remains astonishing. In her first grade classroom there was evidence of modifying strategies she learned from Pacific CHILD. Examples of the text structure of “*compare and contrast*” and “*academic vocabulary*” were visible throughout the room. She discussed how language development in the early grades and for ELLs is critical for future learning. Large chart papers documenting students’ thinking during collaborative group work were readily visible. She built a cognitively-rich environment,

displaying anchor charts with written directions for students on how to use the computer, and how to determine which math strategies to apply when adding and subtracting.

Teaching did not come easily for Theresa. Like Dana, being a teacher was her second career. Involvement in Pacific CHILD affected Theresa's teacher efficacy. Her positive experience in Pacific CHILD motivated her continued implementation of Pacific CHILD strategies. In her interview, she used phrases such as, *"This was new information for me," "It was really worthwhile,"* and *"It really helped me with my teaching."* Despite encountering environmental barriers, such as a lack of resources or administrative support, Theresa continues her journey by tutoring students on the weekend and scaffolding lessons for her first graders. She explained that Pacific CHILD was *"one of the best PD"* [professional developments] around.

In conclusion, each of these individual structural descriptions afforded an opportunity to conceptualize the participants' journey after Pacific CHILD through a process called imaginative variation. The structural condition related to time, relationships, or causality offered perspectives varying by each participant. Bandura (1978, 1986, 2004) explained that people's decisions are influenced by their surroundings and that they must feel capable and determined for change to happen. A person's beliefs may differ from existing conditions resulting in the inability to carry out those beliefs, which can take a toll on teacher efficacy. In the transfer of learning literature, bridging is an analogy for a person's motivational disposition to connect previous and new learning (Perkins & Salomon, 1988, 1992, 2012). For many of these participants, this enabled them to detect situations where connections for transfer could be made, and make decisions based on their social factors (influenced by personal experiences, behaviors, and the environment). The next section examines the group's experience.

## Composite Structural Descriptions

After individual structural descriptions had been created, the next step was to form composite structural descriptions as a way to understand how *all* participants felt about their lived experience *as a group*. Moustakas (1994) ascertained that the use of structural descriptions “involves acts of thinking and judging, imagining and recollecting, to arrive at core structural meaning” (p. 79). I examined all of the individual descriptions and then created the following composite structural descriptions about their journeys after Pacific CHILD

All participants felt overwhelmed regardless of their teaching position or school context. All expressed the amount of work they were expected to complete promptly was unrealistic. They noticed that more demands beyond the instructional day were placed on the classroom teachers. Some served on committees, others tutored students on the weekend, and others attended required professional development.

All participants were loyal and committed to improving their educational system. Each participant described the amount of effort he/she contributed at the classroom, grade, and/or school levels. In a small setting many of them wore multiple hats. They were assigned to responsibilities that may not have additional compensation yet decreased the amount of time available to them for instructional planning. Regardless, participants fulfilled these obligations to show support. For instance, a few participants provided afterschool supervision at no cost to students whose parents were unable to pick them up immediately from school. Others took on leadership roles for extracurricular activities, such as the Glee Club and Saturday School. Moreover, many of them attended student events (e.g., athletic games, academic competitions) that often occurred at night or on the weekends.

All participants agreed that their educational department offered many opportunities for professional growth. They consistently attended various workshops and trainings for participants to expand their knowledge.

All participants felt that they should have a stronger voice in their pathway for professional growth. They indicated that educational program officers decided the educational initiatives, topics for workshops or trainings, and mandated attendance with limited input from teachers. They pointed out that professional development topics did not really address their teaching needs. For example, professional development sessions were mostly in subject areas that were heavily tested (e.g., math, language arts) and other areas were ignored.

All participants had difficulty coming to an agreement describing a quality professional development program. They liked the idea of a long-term professional development program but felt suffocated when programs such as Pacific CHILD were too intense and too long of a commitment. They believed in the idea of holding professional developers accountable for paid services by conducting follow-up sessions in the participant's classroom and with their students. The participants found value when observers watched them teaching. But they disliked the amount of time preparing for these observed lessons.

All participants held a teacher's license. However, most of the participants were not education majors. Each of them explained that Pacific CHILD was their first intensive professional development program. Before this experience, most had never seen another person model lessons in their classrooms, or had never consistently discussed their professional challenges with a colleague. They felt that the mentoring by PREL staff gave them the right tools and support that they should have received during their teacher licensure program.

## Synthesis of Composite Textural and Structural Descriptions

The last step in the phenomenological analysis is synthesizing the individual and composite structural descriptions and forming unified statements (Moustakas, 1994). These composite textural and structural descriptions show the essences of the participants' lived experiences at this particular time in their journey after Pacific CHILD. I have organized this section based on the findings from the two research questions. Similar to the previous section, participants' direct quotes were italicized to illustrate the power of their voices.

### Lessons Learned

The first question in this study was: What lessons were learned regarding the transfer of learning several years after the completion of a two-year professional development program in reading in the Western Pacific?

**Lesson #1. Pacific CHILD had a positive impact.** As a way to contextualize the participants' experiences (Bevan, 2014), all participants were asked to reflect upon their involvement with Pacific CHILD during the initial interview. At the time of Pacific CHILD some participants felt overwhelmed, others resented that it was mandatory, and some appreciated the experience. However, now that they were no longer involved, all participants commented that Pacific CHILD had a positive impact on their educational careers. The examples related directly to the types of professional activities and opportunities to engage with collegiality.

One participant shared, *“At that time, we couldn't complain because we were mandated. But at that time, we were not aware that it would really impact us a lot at the end.”*

Another participant shared, *“It was the best professional development program that I had ever been in” [sic].*

Over the course of two years of Pacific CHILD, participants engaged in different collaborative activities such as structured learning teams and year-round institutes. Participants expressed that they were not involved in these types of learning opportunities before or after, and missed the collegiality with PREL staff and their peers. One participant shared,

*Somebody was right there working with you. You were able to talk about it. As soon as the activity was over, then you had a chance to talk about it some more. You didn't wait until next week or whatever.*

The long-term involvement in Pacific CHILD also allowed participants to strengthen their instructional practices. One participant explained,

*I really don't have a whole lot of background knowledge on what other strategies to use, although I've been attending trainings but I feel that I'm more comfortable using the Pacific CHILD strategies. I guess because of that really in-depth two-year program that I was in.*

Existing studies on professional development designs indicate effective components include active participation, mentoring, and reflective practices that extend over a period of time. (Borko, 2004; Darling-Hammond & McLaughlin, 2011; Garet, et al., 2001; Hill, et al, 2013; Koellner & Jacobs, 2015). Similarly to the literature (Guskey, 1986; Richardson, 1994; Timperley & Phillips, 2003), the duration of their involvement started with behavioral changes in their teaching practices, followed by a change in their attitude and beliefs. In spite of the mandate, these participants saw Pacific CHILD having a positive impact in their teaching.

**Lesson #2. Teacher efficacy affected the transfer of learning.** Teacher efficacy refers to a teacher's confidence and beliefs (Guskey, 2000; Kleinsasser, 2014; Smylie, 1995; Tschannen-Moran & Hoy, 2001). In this study, participants' confidence levels played an

influential role in the transfer process. Any practices they were confident in teaching were transferred. In contrast, practices they felt least confident in were not transferred. The term “*confident*” was explicitly used to express their challenges and successes. For instance, one participant, explained,

*If I wasn't confident, I wouldn't continue using it and I wouldn't even take it to this level and try to mimic what I've learned there into my classrooms with my pre-service teachers so they can use it.*

A different participant expressed her ability with some of the practices: “*Like the vocab and text structure, I'm pretty confident with... the tasks. With the others, I would still want others to guide me.*”

Administrators also provided examples on how the mentoring they received by PREL staff assisted with building their leadership skills. For example, one participant who is now an administrator applied a similar approach to boost her teachers' confidence when they might be struggling in the classroom. She felt that PREL staff had given her the confidence to apply these same skills with her teachers. During her time in Pacific CHILD, she explained that PREL staff was “*[n]ot mean at all... straight forward [sic], but in a way where it was okay. I didn't feel so bad that I made a mistake so I'm trying to apply that with my teachers.*”

The components of teacher efficacy include beliefs, confidence, and actions (Donnell & Gettinger, 2015; Tschannen-Moran & Hoy, 2001). In some cases teachers had strong beliefs with few instructional practices, but did not have the confidence to implement and manage these practices. Smylie (1995) explained that teachers tend not to take risks when beliefs and actions are disconnected.



Self-doubt also played a role in teacher efficacy. Self-doubters were quick to withdraw any efforts if mastery of their knowledge or skills were deficient, despite having contradicting beliefs that these practices were valuable (Bandura, 1986; Timperley & Phillips, 2003). Some participants did not believe they could manage certain practices, and therefore chose not to transfer. In this study, many participants believed differentiated instruction was really important but did not believe they had the capacity to teach this approach effectively. Tomlinson (1990) described differentiated instruction could occur by process, which involves students applying key strategies and skills to learn the outcomes; in other scenarios, differentiation could occur by product, (i.e., students producing a culminating product to demonstrate their learning). Participants who were able to differentiate instruction by process were more successful than those who differentiated instruction by product. For instance, one participant explained, *“Differentiated instruction is a need, but it's time-consuming. Planning and preparing, a little piece a time.”*

Although participants believed the collaborative activities from Pacific CHILD were valuable, they did not know how to manage these activities independently. Most participants saw how the structured learning team meetings (i.e., a modified version of professional learning communities) were a good way to learn from and with other colleagues. However, they opposed the weekly meetings held after school. The issue of time conflicted with their professional beliefs. They believed the meetings took away time from completing other responsibilities, which they often struggled to complete. So when PREL staff stopped providing support, these meetings also stopped. The participants didn't believe these meetings were high on their priority list of things to do, and so did not bother to find alternatives, such as modifying the schedule to

once a month. They could not manage how to make this collaboration work; therefore they chose not to transfer this time-consuming but valuable activity.

**Lesson #3. Teacher preferred instructional practices.** Participant's preference for specific practices were an unintended result of lessons one and two. In this study, text structure, text features, and vocabulary were easily transferred from their experience in Pacific CHILD. The participants' abilities to use these reading practices flexibly in any content area, and the students' acceptance of them, also contributed to the transfer process.

The majority of the participants were no longer teaching in the same position as they were during their involvement with Pacific CHILD. When participants moved to their new environment, they had confidence and rich knowledge to modify these practices.

Participants taught their students how to use text features (e.g., graphs, bold words, images) before and during reading to build background information about a topic. Their students also learned how images and captions embedded in the text were valuable to comprehension.

Participants transferred vocabulary strategies to help students comprehend text at the word level. They felt these practices were effective for the majority of their multilingual students. One participant shared,

*It [Pacific CHILD] helps support their needs, because our kids... have so many languages going on. They have their mother's language, their father's language, the school language, there's so much going on.*

Some participants used different vocabulary strategies to deepen their understanding of a word. For example, when students applied the Frayer model with a vocabulary word, they wrote the definition, a sentence, and found an example and non-example (Pacific Resources for Education and Learning, 2008).

Participants also stressed the importance for their students to comprehend longer pieces of continuous text. They believed their instruction on text structure helped students pinpoint how authors presented their topics through various structures such as sequence, cause and effect, or compare and contrast. Students learned how to use different graphic organizers (e.g., Venn diagrams) or visual representations to dissect the text into smaller chunks. Some participants also explained that they were comfortable teaching these strategies and they were also manageable. For instance, one participant shared, *“I think of delving into the structure of compare and contrast, sequence was easy.”*

### **Factors Affecting Transfer-Shifting Landscapes**

Clandinin, Downey, and Huber (2009) referred to the term “shifting landscapes” as environmental phenomena that impact teachers’ lives, work, knowledge, and identity. Within a shifting landscape, teachers must know how to navigate as changes occur, while simultaneously holding onto their identity. This dovetails with the second research question: What factors in their environment, experiences, and behaviors do teachers report as affecting their transfer and integration of professional development strategies and concepts several years after the program’s completion? The participants’ shifting landscapes included new positions and responsibilities, frequent changes and conflicting conditions.

**Landscape #1. New position and new responsibilities.** New positions and new responsibilities affected nine of the participants. Of the eleven participants, only two were in the same grade and same school as they were during Pacific CHILD. The remaining participants were in a new position, school, or grade level.

One type of change for a few participants was becoming an educational leader, such as an administrator or college instructor. Another was switching to a different grade level. When

participants moved into a different position, there also came new responsibilities and a new environment. If there was environmental support from colleagues, or tangible supports such as readily-available resources, the decision to transfer learning was much easier. Though participants needed to make adjustments in their new environment, it was less complicated compared to participants who did not have a supportive environment.

More importantly, transfer appeared to work most efficiently for participants who were in new positions that provided instruction to students. For instance, one participant was impacted by three variables: her school converted into a middle school, she moved to a different grade level, and she became a content-area teacher, delivering only math instruction. These three changes were significant and could be overwhelming for some participants. Nevertheless, this participant firmly believed that her experience in Pacific CHILD was beneficial. In her new role, she adjusted her instruction by integrating vocabulary instruction and interactive tasks into her math lessons. When her students demonstrated progress under these strategies, she felt validated; thus, her teacher efficacy level had increased. In addition, this participant had supportive colleagues and administrators who encouraged and listened to how she transferred literacy strategies in her math classes. For this participant, having a supportive environment affected her behavior and personal experiences positively, despite being in a new teaching position and grade level. However, it is important to note that this participant did not transfer everything from Pacific CHILD into her new environment. She made decisions on what would be most effective to transfer. This finding is aligned with the result from the first research question of this study: teacher efficacy affects transfer.

**Landscape #2. Always changing.** The frequency of position changes also impacted transfer. The more times participants changed to a different educational position, the more their

ability to transfer decreased. Unlike one new position and responsibilities, multiple moves contributed to a more robust and continuous learning journey. In this landscape, participants had difficulty solidifying their proficiency in their assigned position because they kept moving to a different one. One participant explained,

*Being in a new grade level, trying to get familiar and master the Common Core*

*Standards that are covering this grade level, plus preparing for that testing, it's kind of overwhelming.*

In another example, one administrator shared that after Pacific CHILD he remained a classroom teacher, and then became a school-level reading specialist because he had “*passed the test.*” His interest then turned to administration. As he started embarking on his administrative career as a vice-principal and then a principal, he spent less time providing quality instruction to students. His responsibilities began shifting to managing the school, and his experiences in professional development activities were geared toward leadership skills. Thus his skill sets moved away from instruction for students, making transfer difficult.

**Landscape #3: Conflicting conditions.** Conflicting conditions were environmental factors that affected transfer in which participants rarely had control. One tension was the act of balancing time use among curriculum, instruction and assessment. Participants felt there was never enough instructional time to teach all subject areas. One participant shared,

*So like differentiated instruction, I know it's a need, but with all the testing that we've had and all the changes in the curriculum, it's kind of time consuming for us to be planning and preparing everything.*

Another conflict occurred when the environment was changing. Some participants reported having a new administrator and new grade level colleagues who were not interested in

Pacific CHILD. Although they had shared information and were willing to provide support, their colleagues were unresponsive to learning more. Eventually participants accepted this and did not try to transfer their practices.

### **Conclusion**

I started this findings chapter on how data were collected and analyzed using the phenomenological process. I utilized epoche as a form of trustworthiness throughout the process. I kept digital and audio journals as a way to monitor any biases, and practiced reflexivity by thinking critically about my role and influence as a researcher. During the data analysis phase, the first round was coded using InVivo or verbatim statements that were of equal value. The second round of analysis was conducted using pattern coding or clustering by similar qualities (Saldana, 2013). As a result, I identified twenty-five invariant qualities and clustered them into four themes. I presented individual structural descriptions to gain insights on each person's lived experiences. I then formulated composite textural and structural descriptions to gain insights on how the participants felt as a group. My final step was to synthesize these descriptions according to the research questions. This process helped unify themes to get to the *essence* of the study (Moustakas, 1994). There were three significant lessons and three factors that affected participants' transfer of learning.

The first research question was, "What lessons can be learned regarding transfer of learning several years after the completion of a two-year reading professional development program in the Western Pacific?" After careful examination, the data suggests that three lessons were learned:

1. Pacific CHILD had a positive impact.
2. Teacher efficacy affected the transfer of learning.

3. Teacher preferred instructional practices.

The third lesson was an unintended result from the first and second lesson. For instance, if the participant had a positive experience of applying the practice during their involvement with Pacific CHILD, and was successful with implementing the practice independently, then the practice transferred. If the participant was unsuccessful, the practice did not transfer. Participants preferred practices involving text structure, text features, and vocabulary the most.

The second research question was, “What factors in their environment, experiences, and behaviors do teachers report affect their transfer and integration of professional development strategies and concepts several years after the program’s completion?” The data suggest three factors affected their integration of professional development behaviors into their context:

1. New positions and having new responsibilities affected participants.
2. Participants were always changing positions, therefore were constantly learning new information before being able to solidify current information.
3. There were conflicting conditions in the environment that participants often did not have control over.

In chapter five, I discuss the interpretations of these findings and implications for teacher learning, professional development design, and future research.

## **CHAPTER 5**

### **SUMMARY, IMPLICATIONS OF FINDINGS, AND FUTURE DIRECTIONS**

In this qualitative study, I sought to examine the transfer of learning process by participants who were involved in Pacific CHILD, a reading professional development program implemented in the Western Pacific. In particular, I asked, “What lessons can be learned regarding transfer of learning several years after the completion of a two-year reading professional development program in the Western Pacific?” and “What factors in their environment, experiences, and behaviors do teachers report affect their transfer and integration of professional development strategies and concepts several years after its completion?”

This chapter is laid out in four parts. I first begin with a summary of the investigation. Second, I argue for the significance of this study. Third, I offer implications of the results. Finally, I close the chapter with directions for future research and concluding thoughts.

#### **Summary of the Investigation**

PREL, an external agency, was awarded a contract from the USDOE to conduct an evaluation study, Pacific CHILD, from 2007 – 2009. The participants in this investigation are teachers from the Western Pacific Island of “Veritas” who were involved in Pacific CHILD.

During the two-year program, teachers were involved in various job-embedded activities such as lesson demonstrations, structured learning teams, classroom observations, and professional learning institutes (Abe et al., 2012). These Pacific CHILD activities enabled teachers to gain knowledge and skills on six different instructional strategies (i.e., question generation, text structure, vocabulary, cognitively-rich environments, differentiated instruction, interactive tasks). With guidance from PREL staff, teachers implemented these strategies using expository text in their classrooms



Pacific CHILD was one of the largest RCTs in the Pacific region. A total of 45 schools, 197 fourth and fifth-grade teachers and 3,052 students were involved (Abe et al., 2012). Based on outcome measures, teachers in the treatment group who participated in Pacific CHILD had a statistically significant impact on improving student achievement and increasing their teacher knowledge and teacher practice (Abe et al.). In this investigation, the participants were some members of the treatment group.

Although some perceive RCTs as the “gold standard” of educational research (Hesse-Biber, 2012; Nelson et al., 2009; Spillane et al., 2010; Viadero, 2007), the possibility that local educational agencies in the Western Pacific can replicate a study, using a RCT design such as Pacific CHILD, is highly unlikely. The amount of time, resources, and funding to sustain ongoing efforts are often out of reach for small LEAs. When I collected data for this research, there were no known follow-up studies on the long-term effects of Pacific CHILD. Therefore, one of the problems addressed in this study was understanding the transfer of learning process by participants. For transfer to take place, sufficient learning must have happened during the initial situation (Bransford & Schwartz, 1999; Dreer et al., 2017; Perkins & Salomon, 2012). The study results from Abe et al. (2012) served as a justification of successful initial learning.

As described in chapter three, I implemented a modified version of Moustakas’ (1994) phenomenological framework as my methodology. Applying a phenomenological methodology allowed participants’ voices to contribute toward existing literature. Phenomenology captured participants’ stories and uncovered underlying meanings of their lived experiences (Burnette et al. 2011; Moustakas, 1994; van Manen 1990). I employed surveys, semi-structured interviews, and focus groups to acquire the participants’ authentic experiences.

In chapter four, the data analysis was guided through four distinct processes: epoche, phenomenological reduction, imaginative variation, and synthesis of composite textural and composite structural description (Moustakas, 1994). Twenty-five invariant constituents, or unique qualities, were experienced among the participants. These were later categorized into four themes: (1) types of transfer, (2) barriers and success, (3) teacher learner identity, and (4) collaboration. The constituents within these four themes were then synthesized and became the findings that were presented at the end of chapter four. The data suggested that three lessons about transfer of learning were discovered, and three factors were found to have affected transfer. The results of the first research question about lessons to be learned about the transfer of learning process from a reading professional development program were:

- (1) Pacific CHILD had a positive impact;
- (2) Teacher efficacy affected the transfer of learning; and
- (3) Teacher preferred instructional practices.

The second question related to factors affecting transfer and integration of professional development strategies and concepts in their contexts included three results:

- (1) New positions and having new responsibilities affected participants.
- (2) Participants were always changing positions, therefore were constantly learning new information before being able to solidify current information.
- (3) There were conflicting conditions in the environment that participants often did not have control over.

In chapter four, I made a concerted effort to frame these results for practitioners to gain accessibility. Existing literature suggested that practitioners preferred research studies with clear language and offered directions that could influence change (Hemsley-Brown & Sharp, 2003;

Nelson et al., 2009). The remainder of this chapter involves sharing the significance of this study by further interpreting the complexities and variables from those results in a practical and useful manner for teachers and practitioners.

### **Significance of the Study**

Such journeys open vistas to new journeys for uncovering meaning, truth, and essence- journeys within journey, within journeys...[and]... that each stopping place is but a pause in arriving at knowledge (Moustakas, 1994, p. 65).

I began this study seeking information on the transfer of learning process by participants who were involved with Pacific CHILD. As a Pacific CHILD team member, I contributed toward the design and implementation of the reading program. I delivered professional development in Hawaii and different remote areas such as the one in this study. I learned so much about the complexities and nuances of teacher learning. The context of their teacher lives has given me a deeper understanding how professional development efforts can serve remote areas more effectively.

This study also became my journey *afterward*. I have broadened my understanding and deepened my knowledge in numerous ways. As a novice to educational research, I was compelled to learn about phenomenology and hone in on the *lived experience* of these participants. I valued the importance of allowing local teachers' voices to be heard. In the Pacific, where I am also from, so many of our voices dissipate into the ocean. This tends to happen in island communities where outsiders arrive with the presumptuous perception that "those people need help."

Early in this process, I realized hearing individual voices was complicated at times. The *lived experience* was personal, and for some, meant to be private. At times, I felt like I was intruding on some people's inner feelings when they vaguely described some challenges in their professional development programs. Exercising epoche as a reflective practice (Moustakas, 1994) forced me to ask constantly, "Am I trying to learn how the person has transcended from the phenomenon?" or "Am I projecting my perception on the participant's lived experience?" Because I felt a deep sense of commitment and professional investment in Pacific CHILD, I wanted to know everything. I had to remind myself that these participants' landscapes were no longer rooted in Pacific CHILD; they were on a journey of their own.

Clandinin and Connelly (1996) claimed that classrooms are secret places with lived stories. When teachers leave the "out-of-classroom place on landscape... they portray themselves as experts" (p. 25). I was able to capture participants' voices in ways other researchers have not. I admired those who felt empowered by Pacific CHILD and now advocate for professional development practices in supportive environments where teachers can learn efficiently and in ways their students learn best.

This study contributes to the research canon in the following ways: First, this is the only known study that examined the longer-term impact of Pacific CHILD. In chapter one, I argued that authors of the Pacific CHILD evaluation study did not present data that is consumable for the practitioner at the *practice wisdom* level, or reporting outcomes in a manner for practitioners to utilize the findings in their context (Nelson et al., 2009). To address this gap, I completed this investigation with a qualitative lens. I utilized teachers' voices at a very discrete level. In chapter two, I presented 25 invariant constituents, or the unique qualities, from the participants' experiences. That level of detail examined this closely is rare in the literature. What this study

attempts to do is establish a research template, laying the groundwork for practitioners and administrators to learn from others who have experienced the transfer of learning process from a long-term reading professional development program. These 25 invariant constituents can serve as self-reflection indicators as described in the implications section. These finite details are the “practice wisdom.”

As a former classroom teacher, a common reflective exercise was for me to identify professional practices that were (or were not) working. As a result of this study, practitioners may start delving deeper and use these invariant constituents to articulate why transfer of learning is (or is not) working in relationship to the triadic reciprocal determination theory. For instance, there might be environmental conditions (e.g., other initiatives conflicting with what the practitioner is trying to accomplish), personal experiences (e.g., the practitioner is not making connections from the professional development sessions to classroom practices), or behavioral influences (e.g., the practitioner's collaboration with her/his colleagues motivates the former to teach better). Follow-up and goal setting on what teachers can do and change based on this information are, of course, also essential.

Secondly, this study invites a closer examination of professional development programs beyond a design perspective. While I agree that structure, measurement, and cost are valuable components, I also suggest the four themes that emerged from the invariant constituents have the potential to contribute to the design process. The four themes were (1) types of transfer, (2) barriers and successes, (3) teacher learner identity, and (4) collaboration. In remote areas, or in areas where investments in professional development programs are limited, these four themes can serve as a guide during the professional learning process. I ascertain, like others in the field,

that when designs are formed with the intention to transfer, then success will more likely occur (Dewitz & Graves, 2014; Perkins & Salomon, 1988, 2012).

Third, this study also contributes toward a gap in monitoring the impact of teacher learning. In remote areas, such as the one in this study, there is a heavy reliance on external funding sources to support educational goals (Afamasaga et al., 2007; Leberman et al., 2006; McDonald, 2012a; Puamau 2007). Often when funding stops, so do professional efforts in those targeted areas, as in this case, the focus on reading. The data in this study suggested that participants frequently moved to different teaching positions. Frequent changes in educational efforts do not make a positive impact on students and their teachers. Metaphorically, teachers in remote areas are often on a continuous treadmill of learning. They are usually figuring out one program after another as result of changes in funding sources (Puamau, 2007).

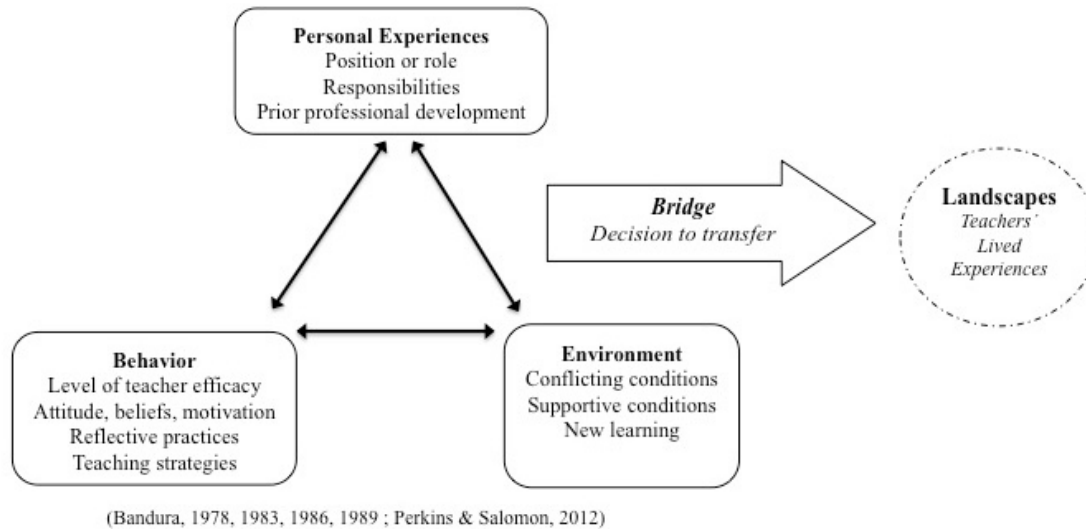
Finally, this study seeks to contribute to the limited body of research in remote areas and, in particular, heed the voices and knowledge of teachers in one area of the region. From the outset, I was adamant in using teachers' stories to learn about their professional development experiences. Throughout the years, I saw how federal initiatives controlled how monies were to be spent for professional development. Those in leadership roles rarely gave teachers an opportunity to share their professional voices and needs. In many conversations, participants discussed the importance of local knowledge. While they valued outside expertise, the participants much preferred working with local experts. The results and implications I am about to share are other examples of how this study contributes to the conversation of teacher learning and professional development in remote areas.

## Implications of Findings

The main aim of this study was to examine the lessons learned and factors affecting the transfer of learning. Though this examination took place in the Western Pacific, many educators can gain professional insights from this research. The phenomenology inquiry gave voice for participants to express their *lived experiences* after a long-term reading professional development program. In this section, I present the implications for practitioners and educational leaders at the school and system levels. First, I offer insights on how practitioners' efficacy is instrumental to transfer of learning. Next, I discuss the importance of stabilizing a shifting landscape. Finally, I highlight ways in which LEAs can extend bridges to connect with systemic efforts and local knowledge.

I utilized Bandura's (Bandura 1978, 1983, 1986, 1989) triadic reciprocal determination model to explore the findings within existing literature (see figure 2). This model offers a visual understanding of the interactions among an individual's behavior, personal experiences, and the environment as influences in transfer of learning. The behavioral influences included teacher efficacy levels, attitude, beliefs, motivation, reflective practices, and teaching strategies. The participant's personal experiences were influenced by their position or role, responsibilities, and prior professional development activities. The environmental influences included conflicting or supporting conditions and new learning. The implications of these interactions will now be discussed.

Figure 2: Integration of triadic reciprocal determination and transfer of learning.



### Teachers' Efficacy is Instrumental in Transfer of Learning

The first major implication of this study is the impact of teachers' efficacy in the transfer of learning process. This implication is important for the following reasons. First, the level of teacher efficacy often guided participants' behaviors. Secondly, the role of initial learning served as an indicator for dispositional behaviors related to efficacy such as attitude, beliefs, and motivation. This implication is based on two results: (1) teacher efficacy affected transfer of learning and (2) teacher preferred instructional practices.

Studies on teacher efficacy highlight the importance of teachers feeling successful in their field (Donnell & Gettinger, 2015; Guskey, 1988; Kleinsasser, 2014; Klingner et al., 1999; Tschannen-Moran & Hoy, 2001). This means, teachers, to some degree, feel like they have control over their circumstances. In this study, the level of teacher efficacy was often guided by participants' behaviors. The findings from this study suggested that teachers' efficacious levels during transfer were a result of their reflective practices and adaptive expertise.



Reflective practice involves teachers examining their actions and deciding how to improve (Griggs, et al., 2016; Larrivee, 2000; Schön, 1987). A critically-reflective teacher, according to Larrivee (2000), is fluid and can move in many directions as opposed to remaining static within a given situation. In this current study, two episodes made participants recognize how reflective they had become, which resulted in their changed behavior: The first was when participants tried to implement Pacific CHILD independently. The second was when professional practices from external providers contrasted with PREL's job-embedded approach. Participants realized the absence of PREL staff forced them to figure out their own solutions to challenges.

Initially, all of the participants continued implementing their working knowledge from Pacific CHILD. Since PREL no longer provided on-site support, observations of the impact on student learning was frequently applied as the participants' reflective tool to determine their success or failure. When students succeeded, the participants felt successful too. Specifically, participants felt knowledgeable and skillful with implementing text structure and vocabulary practices. The more participants implemented these successfully, the more confident they became. This confidence boosted their teacher efficacy. In instances where students struggled, those with high-efficacy utilized reflective practices as an inquiry for change. During their thought process, participants compared why particular students were successful, and others were not. Then, these participants sought ways to modify their instructional practices and applied their adaptive expertise.

Adaptive expertise refers to teachers who are effective at modifying their practices when their situation changes (Duffy & Kear, 2007). Duffy and Kear explained adaptive expertise as giving teachers a voice and encouragement to capitalize on other research-based strategies when

their practices are not working with students. They contended that effective teachers do not wait until an external source tells them what to do. Rather, effective teachers use their “moral compass.” Meaning, teachers are in control of making instructional decisions and modifying research-based practices when the need arises (Duffy & Kear, 2007).

Participants with low teacher efficacy were capable of reflecting on their practices but did not have the right kinds of knowledge to adapt their expertise to the current situation. Through reflection, participants with low efficacy revealed that their beliefs were strong, but they did not have adequate knowledge and they did not have the skills to modify the strategies in their current context. For instance, some participants encountered implemented challenges with question generation and differentiated instruction. These participants believed those practices were effective for struggling readers and ELLs as indicated by literature (National Institute of Child Health and Human Development, 2000; Rosenshine & Meister, 1996; Tomlinson, 1999). But despite numerous attempts, low efficacious participants remained unsuccessful with teaching these strategies. This study supports the notion that change for reflective practitioners evolves from a belief level to a knowledge level, and then to a skill level. The skill level is where knowledge is modified in a specific context (Larrivee, 2000). In other words, their lack of knowledge stemmed from insufficient initial learning of differentiated instruction and question generation. Previously, PREL staff guided them through challenges as a way to help these teachers feel successful. However, these participants had no support at the time of this study. Their limited knowledge affected their ability to adapt practices to their current situation. It was much easier for them to abandon these practices instead of arriving at solutions. These behaviors align with Larrivee’s (2000) findings, in which teachers develop

biases when their practices do not align with their thinking, and therefore tend to shut down new learning when it does not work as planned.

There are a few explanations that could justify behaviors demonstrated by low efficacious teachers. One reason could be that PREL did not spend sufficient time on these strategies during the initial learning. Therefore, teachers' pedagogical knowledge was not substantiated (Borko & Putnam, 1995). The initial learning is revealed as a foundational piece for transfer to occur (Baldwin & Ford, 1988; Bransford et al., 2000; Perkins & Salomon, 2012). The scope and sequence from Pacific CHILD showed that participants spent less time (two terms), learning about question generation and differentiated instruction whereas more time (four terms) was spent learning about vocabulary and text structure. This is an important insight justifying that the number of hours spent in professional development should also include the amount of time spent learning different "topics" as part of the initial learning. Secondly, the literature on professional development indicates that adult learning practices are instrumental for teachers to attain concepts (Knowles, 1972; Moberg, 2006; Thomas, 2007). Knowles (1972) expressed the timing of learning needs to coincide with the development of adults. It is possible that the participants neglected to see what certain strategies looked like in their classrooms during the initial learning despite the number of hours engaged in activities. As a result, participant timing and ability to implement these strategies independently were a factor, perhaps explaining why they struggled in their journey after the learning. Through reflection, they revealed not being proficient in teaching these strategies even during their initial learning. I used the final study results from Abe et al. (2012) as a justification of initial learning since the data suggested there was statistical significance in teacher knowledge and practice. But the data were aggregated among all three Pacific regions who were involved in Pacific CHILD. This too expresses the

importance of utilizing clear study results if intended for use in follow up studies.

This study opens new thoughts about teacher efficacy affecting transfer of learning. This investigation occurred six years later and offered sufficient evidence that participants were able to transfer some of the practices depending on the situation. Goddard, Hoy, & Hoy (2000) asserted that teacher efficacy is content and context specific, (i.e., teachers recognize their strengths and weaknesses in their instructional practices and content knowledge, and at times, with specific groups of students). The data from this current study suggested reflective practices and adaptive expertise were qualities held by participants with high levels of efficacy when compared to teachers with lower levels. While teachers with lower levels of teacher efficacy engaged in reflective practices, their initial learning and abilities to adapt their expertise affected their beliefs and confidence, and ultimately they encountered challenges during the transfer of learning process.

Bandura (1978, 1983) proposed that the efficacy levels of people's beliefs and confidence contribute toward their effort and persistence. Individuals with high efficacy tend to endure and persist to meet their goals in adverse situations, whereas individuals with low efficacy have less endurance and persistence. Further exploration is needed on how school teams can assist teachers with lower levels of efficacy and find methods to gauge teachers' knowledge throughout the professional development program, or the initial learning. There is potential for school staff to design assessment tools based on the unique qualities of the professional development program for teachers to reflect on their growth. For instance, an assessment tool could be designed using the 25 invariant constituents as indicators to determine the kinds of supports teachers may need during and after the professional development. An example of an assessment in reading can be found in Pomerantz & Condie (2017).

## **The Need for Stabilizing a Shifting Landscape**

“Shifting landscapes” refers to the conditions that impact teachers’ lives, work, knowledge, and identity from their past and in the present (Clandinin et al., 2009). In this study, participants frequently changed teaching positions. Of the eleven participants, only two remained in the same grade level and the same school as they were during their involvement with Pacific CHILD. All these shifts happened within six years. In many instances, the administrator decided to move teachers into new positions. In fact, adapting to new circumstances was the norm, not the exception, for participants in their educational landscapes.

The second implication is geared for practitioners and school leaders to examine how the frequency of teacher movement impacts teachers’ long-term professional growth. This implication was based on two findings: (1) new positions and having new responsibilities affected participants; and (2) participants often changed positions, therefore were constantly learning new information before being able to solidify current information.

Practitioners and administrators may need to consider the long-term effect when assigning teachers to new roles or new positions. Being in a new position requires new learning. Borko and Putnam (1995) explained that pedagogical knowledge and beliefs about specific subject matter are not instantaneous and need time to percolate. Achieving this level of depth can be difficult for a teacher who is constantly moved to new positions such as those from this study. The opportunities to test their knowledge and deepen their understanding through practice in the classroom decreases as they are constantly being shifted to new environments (Borko, 2004; Croft, Coggshall, Dolan, Powers, & Killion, 2010; Desimone, et al., 2002; Garet et al., 2001; Joyce & Showers, 1983). Attaining proficient levels of subject matter can be challenging for teachers during this current landscape of reform education where they are expected to provide

instruction much differently from how they were taught (Borko & Putnam, 1995; Dewitz & Graves, 2014; Nelson et al., 2009; Ravitch, 2010, 2013; Sykes, 1996).

A common pattern revealed in this study was the effect on participants' behavior as a result of the interaction between their personal experiences and the environment conditions (Bandura 1978, 1983, 1986, 1989) (see figure 2). The interactions between personal experiences and the conditions in their new environment yielded different behavioral outcomes. For instance, one participant changed to a new grade level and specialized to teaching one specific content area. Because she had high levels of efficacy and a supportive environment in her new grade level position, opportunities for transferring learning into her classroom were much more extensive and occurred in a relatively smooth process. In comparison, another participant also switched to different grade levels within the school. Her efficacious levels were much lower, and her environment was less supportive. Therefore, transferring her learning into the new position was much more challenging.

This implication brings new understanding regarding teachers' ability to transfer their knowledge when moving to a new position. The results from this study suggest that when participants frequently moved from one work position to another they are involuntarily immersed in environments that do (or do not) readily embrace their existing knowledge. At a broader scope, excessive movements can be complicated for teachers to cultivate professional expertise on their assigned teaching roles in a short time. The pathway for learning transfer becomes more complex when teachers need to make decisions that may (or may not) fit in with their current environment. On the other hand, this study also found that teachers can reach transfer if the influences from their personal experiences, environment, and behaviors interact positively. This pattern is consistent with Bransford and Schwartz (1999) who claim that people can modify their

environment for successful transfer if their decisions relate to behavioral adjustments that are compatible with their current situation.

Decision-making in the transfer of learning literature is related to the concept of bridging. Perkins and Salomon (1988, 1992, 2012) explained that bridging involves the learners' cognitive abilities to *detect* previous and new learning, then *electing* whether or not to *connect* their learning to the new environment (see Figure 2). *Connecting* is where initial learning and the new transfer situation occur. Perkins & Salomon purported that ways of connecting may look different for each person, and at times, connections can be made but the bridge to the new context might be too far to reach. Participants who became administrators in this study are examples of trying to connect with a bridge that is too far. They were able to make connections when they were still in the classroom working with students. However, when their new role shifted to being school leaders, transferring their reading knowledge from Pacific CHILD became less of a priority. Their new landscape outside of the classroom required them to enact other responsibilities beyond instruction and their priorities shifted toward school-wide efforts.

This study offers new perspectives on involving participants who move out of a practitioner role (from an original study) and into an administrative role (in a transfer of learning study). When I set the criteria for my purposeful sampling, I had an assumption that these administrators would be inclined to use practices from Pacific CHILD because of their role as instructional leaders. This proved to be difficult, as I had no opportunities to observe how their practices had transferred in the school's staff development. I propose that researchers, who are interested in conducting transfer of learning studies that emphasize specific instructional practices, consider how participants who are removed from classroom settings will contribute to

the body of knowledge. Some options could be designing tools specifically for administrators, excluding them from the study, or utilizing a different methodology.

In addition, this study opens up questions for administrators who frequently move teachers to new positions. Queries such as, “What is the purpose of moving this teacher to a new position?” or “How does moving this teacher affect school efforts?” or “How does this teacher’s knowledge and skill level qualify in the new position?” or “How often has this teacher moved?” can increase awareness of teacher movement and its impact on long-term professional efforts. For instance, one participant held three different positions within six years. All three positions were considered promotions; however, I suggest that this movement disrupted the development of this teacher’s knowledge, which negatively impacted transfer from professional development efforts. I contend that administrators’ efforts should establish school practices so teachers can feel the environment is a stable and supportive place for their continued learning. Some suggested practices include keeping teachers in the same grade level positions until they have solidified their understandings, examining potential disconnects between professional development environment and classroom environment (Cheng, 2015; Murrill et al., 2013; Perkins & Salomon, 1988, 2012), establishing collaborative support systems for teachers when they encounter challenges (Borko & Putnam, 1995; Dede et al., 2009; Desimone et al., 2002) and offering opportunities for teachers to see how their current practices align with curricular and testing decisions (Dreer et al., 2017; Klingner et al., 1999; Murrill et al., 2013)

In summary, stabilizing a shifting landscape is significant for transfer of learning to occur. Teachers moving to new positions and new environments can disrupt their learning growth, which may potentially affect school initiatives. In a new situation, the interactions between a person’s experiences and the environment will most likely influence how an individual behaves.



Under the ideal conditions, transfer may occur in a shifting landscape. However, more exploration is needed on what transfer of learning of instructional practices would look like for teachers from an original study who later move into new positions and environments that do not include work with students. In addition, administrators' decisions on teacher movement and the environmental conditions play a pivotal role in the transfer of learning process. In the next section, I discuss transfer of learning from a systemic level.

### **Building Contextual Bridges**

In the previous section, I described the concept of bridging as the learners' cognitive efforts in detecting, electing, and connecting previous learning to a new situation (Perkins & Salomon, 1998, 1992, 2012). This third implication draws attention to contextualizing systemic efforts by the LEAs. If LEAs are expecting teachers to transfer their learning from professional development programs into their classrooms, two issues need to be considered. First, a comprehensive understanding of current school and systemic initiatives and the intended outcomes must be articulated to all involved. Secondly, future professional development should involve the expertise of local knowledge and long-term plans. This discussion is based on the results: (1) there were conflicting conditions in the environment that participants did not have control over; and (2) Pacific CHILD had a positive impact.

Professional development is considered the initial learning situation in transfer of learning where teachers obtain knowledge before implementation in the classroom. McDonald (2010) described transfer of learning and professional development as an interactive dynamic. Both are needed for teacher and program success. Although Pacific CHILD was a teacher-imposed program, evidence from this study shows that transfer of learning occurred at varying levels despite participants not having any support after the professional development. Therefore,

to ensure transfer efforts will be maximized, administrators need to provide the right kinds of environmental supports that link with other initiatives. This finding is consistent with other studies that found a relationship between environmental conditions and transfer of learning (Bransford & Schwartz, 1999; Dreer et al., 2017; Marini & Genereux, 1995; Murrill et al., 2013). All of the participants expressed some sort of conflicting condition in their environment over which did not have control. This supports Cheng's notion of transfer maintenance and transfer relapse as vital signs to post training behaviors (Cheng, 2015; Dreer et al., 2017; Ford, 1994). He posited that when environments can support teachers' learning, their post-training behaviors are often maintained or persist over time. Cheng (2015) also noted that when teachers do not have environmental supports, they are more likely to relapse into old behaviors from prior to the training.

At the school level, participants did not have a clear message on how to integrate their learning from Pacific CHILD with school initiatives or encountered conflicting conditions such as new curriculum or mandated testing. This reinforces the notion that when professional development efforts are coherent with other initiatives in the school environment, the possibility for transfer increases (Garet et al., 2001; McDonald, 2011; Timperley et al., 2007; Yoon et al., 2007). At the same time, this study showed that some school-wide decisions are systemic directives that could not be avoided. Therefore, leaders at the LEA level must have a firm understanding of how system-wide initiatives impact school level efforts. For instance, participants described the increasing amount of testing and how it decreased their amount of instructional time. With this limitation, some participants did not have the flexibility to provide other kinds of instruction and focused on implementing the mandated curricula and testing.

In remote areas, systemic mandates are often associated with external providers. The problem with this situation is that externally driven mandates are often short-term initiatives such as in the case with Pacific CHILD. Learning how to maximize efforts with external providers can be productive for LEAs if the efforts were contextualized. Some believe the external providers' goals are based on the funding source and supersede the participants' needs (Afamasaga et al., 2007; Leberman et al., 2006; McDonald, 2012a; Puamau, 2007). As LEAs in remote areas consider working with external providers and researchers on projects, their decision should be based on the participants' needs and whether the funding source will be subsidized for a period of time for change to occur. Puamau (2007) explained that LEAs need to "backward map to ensure their vision is not swamped in the different reform agendas of their development partners" (p. 83). In addition, LEAs should include the development of long-term plans and possibly policies to ensure transfer efforts start before the funding ceases such as in the studies by McDonald & Melchior (2008) and Whitehead (2010). Both observed school-based staff continue professional development efforts after the external provider no longer offered support. Although Pacific CHILD was designed under the constraints of the USDOE and had substantial funding, I contend that PREL could have put forth more effort in helping remote areas create transfer of learning plans. The results of this study suggest that participants were able to transfer some practices six years later. I assert that if PREL took time to assist the LEAs with designing transfer plans, perhaps more participants would have been more successful with transfer. The potential for future actions call for providers and researchers to allocate time with helping LEAs design transfer plans as part of their collaboration, especially in remote areas.

The results from this study also uncovered an unexpected shift in participants' perspectives of utilizing external providers in remote areas. The rigor and long-term

involvement of Pacific CHILD had set the foundation for deepening participants' understanding of professional development designs. At the time of this study, external providers did not exercise the same kind of follow-up behaviors as PREL staff. PREL's absence made participants pay close attention to their current trainers' involvement. In this study, participants expressed criticism of external consultants and LEA leaders. They noticed that external providers rarely offered school-based support, the duration of activities were shorter, and the cost to pay for their services seemed excessive. Moreover, the practices exhibited by external providers would frequently sway how participants responded professionally. Two participants from this study suggested the lack of involvement by current trainers made participants and the trainer less accountable. A few also mentioned they were less attentive at current workshops because they knew no one would follow-up to determine if they transferred any of their learning into their classroom. These participants faulted school and LEA leaders for not demanding more quality from teachers and the external providers. Despite the participants' unhappiness with external providers and their perception of the poor quality professional development they were receiving, not one of them felt compelled to share their frustration explicitly with leaders who could make changes. Hezel (2013) explained that people living in remote areas often mask differences of opinions in subtle ways. Some participants concealed their unhappiness by posing questions to each other (instead of leaders) such as, "Would it possible for PREL to continue work with us?" or "Why did we decide to work with...?" After delving deeper, the conversation with participants always referred back to "who" the trainer was.

This study draws attention to the importance of local knowledge. Despite PREL being an external provider, the organization made a wise decision with employing a respected retired local teacher. All the participants felt comfortable with her, and she easily related to the participants

professionally and culturally. From the participants' perspectives, she was *one of them*. They had access to her all the time. This finding corroborates existing information about accessing local knowledge such as the study by Leberman et al., (2006). Participants from their study reported the trainer's level of local knowledge was important not only during the professional development activities but also later when the participants transferred their learning into their context. To sustain efforts in remote areas, LEAs are advised to utilize their local knowledge, a local educator whose expertise includes cultural and educational proficiency. Designing professional development programs is an extensive process. Ideally, this local expert should be a part of the design implementation, and the transfer of learning process with the foresight to build bridges that connect with existing and current initiatives.

In this section, I described the implications of these findings under the themes of teacher efficacy effecting transfer of learning, stabilizing a shifting landscape, and building bridges to contextualize current and existing professional efforts. These implications draw upon several important issues that will be addressed in the directions for future research.

### **Scope and Limitations**

Phenomenology studies tend to involve fewer people to ensure in-depth analysis of the experience is achieved (Connelly, 2010; Moustakas, 1994). The scope and limitations of this study refer to the boundaries and unforeseen circumstances. The investigation involved eleven participants from one remote area in the Western Pacific. All participants in this study were also involved with Pacific CHILD for two years and had invested over 49 hours in professional development activities. Due to teacher attrition and movement, some teachers with only one year's experience in Pacific CHILD (out of two years possible) were excluded from this study.

Although teacher observations are critical in assessing instructional effectiveness, there was no assurance that participants would teach lessons based on Pacific CHILD because it was a part of their daily repertoire, or if they were delivering these lessons as a way to comply with the researcher's request. Instead, I collected artifacts as evidence of transfer of learning in ways similar to other studies (Leberman et al., 2006; Silk, Silver, Amerian, Nishimura, & Boscardin, 2009) and a common practice in qualitative studies (Glesne, 2015; Leberman et al., 2006; Merriam, 2009). Stake (2004) posited that artifacts could establish the chain of events and the history of involvement with programs. In this study, artifacts were instrumental. In many instances, they served as a launching point for participants to be the storytellers of their "journey after" in a more meaningful way than delivering a classroom lesson.

There were some unforeseen technical challenges in this study. One incident was a broken underwater cable that provides telecommunication to Veritas Island. Another incident happened during data collection. While conducting member checks, a category five typhoon that had struck the island caused major damage to the communication infrastructure, making timely communication with participants difficult. As a result, one person was unable to read her transcripts due to loss of electricity and limited access to the Internet. Eventually, she did agree to the contents.

Additionally, two participants declined participating in a second interview, however, I included their single interviews, although limited compared to other participants.

Also, documenting the transfer of learning process for participants who were now administrators proved to be challenging. As I reported in my findings, the distance from their current role and delivering instruction was too far. Perhaps I could have established a clearer definition of the context "as a place of practice that involves instruction with students". Instead,

I described the place of practice at the “school” level. I discovered the place of practice for administrators included managing programs and teachers, which is different than delivering instruction for students.

Staying true to phenomenology, I employed interviews, focus groups, and surveys. While I posed these *lived experiences* as strengths, these stories are also self-reported. Different methods were used to ensure trustworthiness. A qualitative paradigm assumes that the eleven participants in this investigation carefully examined their practices and provided accurate information.

Moreover, it is important to acknowledge that Pacific CHILD, the backdrop for this study, was implemented in two other Pacific island communities. I chose to focus on Veritas Island due to having greater access to the participants. The results from this study are not intended to be generalizable to those other communities.

### **Directions for Future Research**

Three recommendations for future research are suggested in this section: (a) examine teacher movement when determining the impact of transfer of learning, (b) investigate how to integrate influences from other professional development initiatives that promote transfer, and (c) continue contributing to the literature on teacher learning in remote areas.

Evidence from this study showed that teachers frequently moved to different roles and environment within a six-year timeframe. One recommendation is to investigate the rationale for teacher movement and its impact on professional development efforts. Existing studies have focused on teacher attrition and mobility in public and private school settings, or to other countries (Iredale, Voigt-Graf, & Khoo, 2012; Marvel, Lyter, Strizek, & Morton, 2007). In remote settings where teaching population tends to be much smaller, more detailed information

is needed on teacher movement within the system and its impact. These details may include how long a teacher has remained on the grade level, different schools at which he or she has taught, and documenting the purposes for the movement. The results can potentially offer insights as to why there is a teacher shortage in remote areas (Heine & Emesiochl, 2007). Perhaps establishing policies to stabilize the school environment and teacher movement may put this idea into practice.

Most transfer of learning studies examined what or how participants had utilized their knowledge from previous programs into their current setting. One of the challenges with framing this study through a transfer of learning lens is the complexity in deciphering the impact of other professional development experiences. In this investigation, participants mentioned other professional development initiatives as having analogous content and strategies from Pacific CHILD. Other studies confirmed that unrelated initiatives impede the transfer of learning process (Klingner et al., 1999; Murrill et al., 2013; Pomerantz & Condie, 2017). However, there is a need to study how similar professional development programs may contribute to teachers' ability to transfer their learning, especially in remote areas where there is a continuous flow of external providers seeking to support educational efforts. In addition, it would be helpful to learn the reasons why LEAs decide to work with external providers.

Finally, this study reinforces the need to investigate professional development programs in relationship to transfer of learning in remote areas. McDonald (2010) explained that professional development and transfer of learning go hand-in-hand. The importance of using local knowledge in professional development designs and stabilizing teacher movement can make a difference in with supporting educational efforts at the school and systemic level. The personal stories shared by the participants offer insights into how teacher efficacy is influenced by personal experiences, the environment, and behavior during the transfer of learning process.



Moreover, including people at the local level has the potential for programs to sustain beyond the external providers involvement. This has the potential to eliminate teachers from learning a program every few years when donor funds are no longer available.

### **Concluding Remarks**

Participants' lived experiences provided new insights on how transfer of learning unfolded six years later after their involvement in a long-term professional development reading program. Using phenomenology captured each person's story in his or her own landscape at a very detailed level. Transfer of learning was complicated for some and smoother for others.

The most important finding was the role of teacher efficacy in relationship to transfer of learning. Utilizing the triadic reciprocal determination model assisted with identifying influences that interacted with a participant's personal experiences, behavior, and attitude. This model paved the way to explore other findings such as participants frequently shifted to new positions and new environments, and that conflicting conditions in the environment made transfer challenging for the participants.

A motivating factor that compelled me to launch this investigation was to identify the longer-term impact of Pacific CHILD. As a result of this study, I was able to complete the first known follow up study of Pacific CHILD. Secondly, I was able to capture participants' voices and shared these experiences through narratives, quite similar to the act of telling stories, which is prevalent in remote areas. Third, I reported findings that are considered "practical wisdom" (Nelson et al., 2009) to help practitioners know that teaching the strategies of text structure and vocabulary (two findings from this research) are doable within remote area classrooms. Finally, I hope that practitioners in remote areas will continually share their voices and ideas on the importance of effective professional development to external providers and local leaders.

I conclude this study with ideas on thinking of my next journey with transfer of learning. As a cohort coordinator and instructor in an undergraduate teacher preparation program, the theoretical framework of transfer of learning has expanded my thinking. The challenge of transfer of learning from one context to another is not only complicated for in-service teachers, but also for pre-service teachers as well. In four semesters, these pre-service teachers are expected to be students and teachers simultaneously (Freese, 2006). This can be quite difficult when pre-service teachers are in the apprenticeship phase of becoming a professional educator. Their subject matter knowledge, pedagogical practice, and teacher beliefs are still in trial-and-error mode.

Transfer of learning stresses the importance of the initial learning situation as a variable for transfer to occur in future learning (Perkins & Salomon, 1988, 1992, 2012). I am better able to see the gaps in my teaching when I notice these candidates are encountering moments in their field experience classroom that are contrastive of what they are learning in my methods courses. At the same time, this study has reminded me that the educational landscape continually shifts. I am more cognizant of the need to be a reflective practitioner and adapt my expertise according to these shifts while holding on to my professional beliefs.

## Appendix A

### Teacher Background Survey

#### *Two-Year Professional Development Program*

My name is Jennifer F.M. Padua. I am a doctoral student at the University of Hawaii Manoa (UHM). As part of my degree program, I am conducting a research project. I am asking you to participate in this project because you were a participant in Pacific Resources for Education and Learning's (PREL) Pacific CHILD study. The purpose of my project is to understand the transfer of learning from Pacific CHILD into your current context and factors that may or may not have any influence.

**Project Description – Activities and Time Commitment:** If you decide to take part in this project, you will be asked to fill out a survey. The survey questions consist of short responses and multiple-choice items. The survey is accessed on a website which I will provide you with a link. Completing the survey will take approximately 15-20 minutes. I expect around 11 people will take part in this project.

**Benefits and Risks:** There will be no direct benefit to you for taking part in this project. The findings from this project may help create a better understanding of the wishes and needs of teachers who are seeking information about professional development. There is little risk to you in participating in this project.

**Confidentiality and Privacy:** Your name and school name will be collected in the survey for the purposes of setting up semi-structured interviews and focus groups. After these activities, your names from the survey will be de-identified.

**Voluntary Participation:** You can freely choose to take part or to not take part in this survey. There will be no penalty or loss of benefits for either decision. If you do agree to participate, you can stop at any time.

**Questions:** If you have any questions about this study, please contact me via phone at (808) 690-4142 or via email at [paduajen@hawaii.edu](mailto:paduajen@hawaii.edu). You may also contact my advisor, Dr. Sarah Twomey, at (808) 956-5898 or via email at [twomey@hawaii.edu](mailto:twomey@hawaii.edu). If you have questions about your rights as a research participant, you may contact the UHM Human Studies Program at (808) 956-5007 or [uhirb@hawaii.edu](mailto:uhirb@hawaii.edu). Thank you for your consideration.

**To Access the Survey:** Please go to the following web page: *(will be set up upon research approval)*. You should find a link to the survey and instructions for completing it. Completing the survey will be considered as your consent to participate in this study.

Please print a copy of this page for your reference.

**Participant Background Survey**  
(adapted from Abe, Thomas, Sinicrope & Gee, 2012)

**Part I. Your Professional Background**

1. Name:
2. Current position and school information  
Position:  
School:  
Grade level:
3. Which of the following do you currently hold (check all appropriate boxes)
  - ☐ High school diploma
  - ☐ Associate's degree
  - ☐ Bachelor's degree
  - ☐ Master's degree
  - ☐ Doctorate or professional degree (e.g., Ph.D., Ed.D., M.D., J.D., DDS)
4. Which of the following teaching credentials or professional licenses do you hold (Check all appropriate boxes)
  - ☐ Teaching Credential
    - ☐ CNMI
    - ☐ List other (state/entity):
  - ☐ Special Endorsement
    - ☐ Special Education
    - ☐ ESL
    - ☐ TESOL
    - ☐ Bilingual Education
  - ☐ Administrator
  - ☐ National Board Certification
  - ☐ Other (specify)
  - ☐ None of the above
5. Please describe your past teaching experience. Including the current school year, how many years have you been teaching at *any K-12 school (either full time or part time)*? Include all teaching experiences except student teaching.  
\_\_\_\_\_ year(s)
6. Including the current school year, how many years have been teaching at your current school? Include all teaching experience except student teaching.  
\_\_\_\_\_ year(s)
7. Is your current school the same school you taught at during your participation in the Pacific CHILD program? \_\_\_\_ yes \_\_\_\_ no

## Part II. Instructional Practices

This part is to understand if you may be using any instructional techniques from Pacific CHILD during the 2013-2015 school years.

8. **Teachers/Tutors/Instructors:** Please indicate **how often** you use the following instructional techniques in your classroom. (Provide one response per row).

**Administrators:** Please indicate **how often** do you advise **your staff** to use the following techniques in their classroom. (Provide one response per row).

	Never/ Rarely	1-2 times per month	1-2 times per week	1-2 times per day	Not Applicable ( <del>does</del> not apply to my context/role)
<b>Instructional techniques</b>					
a. Explicitly teach academic language particular to English Language Arts					
b. Use multiple techniques to make concepts and tasks clear (e.g., visuals, <u>manipulatives</u> , <u>realia</u> , modeling)					
c. Provide below-grade level materials available for students with lower English proficiency					
d. Provide opportunities for all students to use higher-order thinking skills (e.g., problem solving, predicting, organizing, evaluation, self-monitoring)					
e. Simplify language input to make it more comprehensible to English language learners*					
f. Use the students' primary language to clarify concepts					
g. Adjust expectations for students whose limited English proficiency prevents them from meeting instructional targets					
h. Provide students with extra wait time					
i. Explicitly teach reading comprehension strategies					
j. Group students by their proficiency in English					
k. Create groups of students, each consisting of students with the <u>same</u> skill/comprehension levels					
l. Create groups of students, each consisting of students with <u>different</u> skill/comprehension levels					
m. Explicitly correct student speaking errors (e.g., pronunciation, grammar)					

This space is provided if you wish to offer an explanation for any "not applicable" responses.

### Instructional Techniques with Students

This part is to understand the instructional practices and techniques used with students during the 2013-2015 school years.

9. **Teachers/Tutors/Instructors:** Please indicate how frequently do you typically ask your students, including diverse learners (e.g., English language learners and special education students), to engage in the following activities during the 2013-2015 school years. (Provide one response per row)

**Administrators:** Please indicate how frequently do you typically ask your staff to engage in the following activities with their students, including diverse learners (e.g., English language learners and special education students) during the 2013-2015 school years. (Provide one response per row)

	Never/ Rarely	1-2 time per month	1-2 times per week	1-2 times per day	Not Applicable (does not apply to my context/role)
<b>Instructional techniques</b>					
a. Develop oral or written summaries of reading					
b. Evaluate their own work					
c. Complete workbook or textbook exercises in class					
d. Evaluate a piece of work completed by another student					
e. Memorize vocabulary, facts, rules, or procedures					
f. Engage in discussions about the assigned reading					
g. Listen to lectures and take notes					
h. Work in small groups of two or more students					
i. Recite poetry, speeches, or passages from memory					
j. Use data and text references to support their ideas					
k. Complete tests or quizzes					

This space is provided if you wish to offer an explanation for any "not applicable" responses.

## School Context

This part is to understand your current context (e.g., school, classroom environment, students)

10. To what extent is each of the following a challenge at your school? (Place an X in one box per row)

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.



	Not a Challenge	Minor Challenge	Moderate Challenge	Serious Challenge	Not Applicable (does not apply to my context/role)
a. Shortage of teachers that work with English language learners*					
b. Time for teachers to collaborate					
c. A high proportion of English language learners*					
d. Student behavior/ discipline					
e. Lack of community or parent support					
f. Lack of student motivation					
g. Lack of appropriate materials for students					
h. Lack of appropriate materials for diverse students (e.g., English language learner*, Special Education, Gifted and Talented)					
i. Collegiality among faculty					
j. Lack of administrative support					
k. Lack of professional development opportunities					

This space is provided if you wish to offer an explanation for any "not applicable" responses.



## Language Arts

This part is to understand the English Language Arts in your current context. Provide one response per row

11. **Teachers/Tutors/Instructors:** To what extent do you agree with the following statements? *"My ability to teach to the English Language Arts standards is limited by..."*

**Administrators:** To what extent do you agree with the following statements? *"My ability to lead the staff in my school to teach the English Language Arts standards is limited by..."*

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.

	Not at All	Very Little	Somewhat	A Great Deal	Not Applicable (does not apply to my context/role)
a. The number of English language learners in my class/school*					
b. The number of students in my class					
c. The low ability of my students					
d. The level of parent or community support					
e. My knowledge of working with English language learners*					
f. The range of students' needs in my class/school					
g. A lack of support from principals/administrators					
h. My knowledge of the content area					
i. A lack of support from other teachers					
j. Availability of materials and resources					
k. My lack of fluency in the English language					
l. The requirement that instruction can be ONLY in English					

This space is provided if you wish to offer an explanation for any "not applicable" responses.



**Pacific CHILD**

This is to understand your knowledge and ability of Pacific CHILD since your participation.  
Provide one response per row.

12. Since your participation in Pacific CHILD, rate **your ability** on the following behaviors  
(Place an X in one box per row).

**\*An English language learner** is defined as the student's primary language to communicate is in another language that is not English.

	Not effective at all	Not very effective	Somewhat effective	Very effective	Don't know
a. Your knowledge regarding the needs of English language learners*					
b. Your confidence in implementing the Pacific CHILD components in the classroom					
c. Your awareness of the cultures of English language learners*					
d. Your knowledge regarding reading comprehension strategies					
e. Your use of the text structures (e.g., cause and effect, compare and contrast)					
f. Your use of vocabulary development techniques with students					
g. Your ability to differentiate instruction					
h. Your use of flexible grouping strategies					
i. Your ability to create a cognitively rich environment in the classroom					
j. Your knowledge of English language development					
k. Your ability to incorporate interactive tasks into your lessons					
l. Your use of text features					

This space is provided if you wish to offer an explanation for any "don't know" responses.

## Appendix B

### Semi-Structured Interview Question Protocol

#### Semi-Structured Interview Question Protocol

*The Journey After: A Phenomenological Examination of Teachers' Transfer of Learning From a Two-Year Professional Development Program*

**Welcome.** Welcome and thank you for agreeing to participate in my research study. You have been invited because of your participation in the Pacific CHILD program that was sponsored by PREL. I'm interested in finding out to what extent learning from the Pacific CHILD professional development transferred into your teaching and/or educational practices, and to what extent they do or do not continue to influence your practices given the six years that have passed since the professional development. Your experiences are important because it will help me understand if and how you have used Pacific CHILD since the study has ended. There are no right or wrong answers to the questions that I will ask. You may choose to skip any questions or stop your participation if you feel uncomfortable. I know you have a busy schedule and I appreciate the time you are taking to share your experiences.

**Purpose.** The purpose of this interview is to gain an in-depth description of lessons learned from Pacific CHILD.

#### Interview Questions.

1. Looking back, what experiences of Pacific CHILD stood out for you?
2. I noticed on the Teacher Background Survey that you responded...could you tell me more about this response?
3. Have your experiences with Pacific CHILD helped you in your current position? If so, how.
4. It's been several years since the Pacific CHILD professional development. Do you implement any specific activities/strategies in your context (e.g., classroom, school, courses)? Explain which ones.
5. Why do you continue (or discontinue) the use of Pacific CHILD in your context?
6. If you are continuing to implement Pacific CHILD, what evidence do you have that supports your implementation?

7. Did you receive any type of professional development support in your context to assist with your continued use of Pacific CHILD? What are some examples?
8. Since Pacific CHILD, what other professional development activities have you participated in?
9. Describe how these activities were similar or different to Pacific CHILD.
10. Do you feel that these activities have built on Pacific CHILD? Explain why or why not.
11. From your perspective, did Pacific CHILD meet your individual needs so that you were able to implement the strategies independently (e.g., without PREL support)? What types of professional development would meet your individual needs?
12. Please clarify or describe what you meant the last time when you said...
13. Is there anything you would like to add about your experience after Pacific CHILD that you would like to discuss?

**Closing statements.** Now that we are finished, I would like to remind you that this recorded session will be transcribed. I will email you a copy of the transcription for you to verify and make revisions as you wish. You will then read and send me any revisions or a confirmation that the transcription is accurate. I will give you a pseudonym to ensure your identity will remain anonymous. All the information collected will be destroyed. Do you have any questions? Thank you again for your participation and contributing to this research.

(Collect a non-work related email address)

## Appendix C

### Transfer of Practice Checklist

#### University of Hawai'i

#### Consent to Participate in Research

#### *The Journey After: A Phenomenological Examination Of Teachers' Transfer Of Learning In A Two-Year Professional Development Program*

My name is Jennifer F.M. Padua. I am a doctoral student at the University of Hawaii Manoa (UHM). As part of my degree program, I am conducting a research project. I am asking you to participate in this project because you were a participant in Pacific Resources for Education and Learning's (PREL) Pacific CHILD study. The purpose of my project is to understand the transfer of learning from Pacific CHILD into your current context and factors that may or may not have any influence.

**Project Description – Activities and Time Commitment:** If you decide to take part in this project, you will allow the researcher to use the Transfer of Practice Checklist in your context. The checklist is an observational tool that will be used by the researcher to document any artifacts found in the participants' environment that may support any transfer of practices from a two-year professional development program. The checklist will be used during the 1-hour semi-structured interview. I expect around 11 people will take part in this project.

**Benefits and Risks:** There will be no direct benefit to you for taking part in this project. The findings from this project may help create a better understanding of the wishes and needs of teachers who are seeking information about professional development. There is little risk to you in participating in this project.

**Confidentiality and Privacy:** No personal identifiable information will be collected. After data has been collected and analyzed, the checklist will be destroyed.

**Voluntary Participation:** You can freely choose to allow the researcher to use or not use the checklist in your environment. There will be no penalty or loss of benefits for either decision. If you do agree to participate, you can stop at any time.

**Questions:** If you have any questions about this study, please contact me via phone at (808) 690-4142 or via email at [paduajen@hawaii.edu](mailto:paduajen@hawaii.edu). You may also contact my advisor, Dr. Sarah Twomey, at (808) 956-5898 or via email at [twomey@hawaii.edu](mailto:twomey@hawaii.edu). If you have questions about your rights as a research participant, you may contact the UHM Human Studies Program at (808) 956-5007 or [uhirb@hawaii.edu](mailto:uhirb@hawaii.edu). Thank you for your consideration.

Please print a copy of this page for your reference.

**Signature(s) for Consent:**

I give permission to join the research project entitled, *The Journey After: A Phenomenological Examination of Teacher's Transfer of Learning From a Two-Year Professional Development Program*.



Please initial next to either "Yes" or "No" to the following:

\_\_\_\_\_ Yes      \_\_\_\_\_ No      I consent to allow the use of the Transfer of Practice Checklist  
in the interview portion of this research.



**Name of Participant (Print):** \_\_\_\_\_

**Participant's Signature:** \_\_\_\_\_

**Signature of the Person Obtaining Consent:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Transfer of Practice Checklist

### Overview

A semi-structured interview will be conducted to understand each participant's experience. Ideally, the interview will take place in the participant's environment (e.g., classroom) during non-instructional hours (e.g., after school) and no students will be present. During the interview, the researcher will utilize the Transfer of Practice Checklist in a similar manner as taking field notes. Engle, Lam, Meyer, & Nix (2012) posited that the physical context is often overlooked in the transfer process. The purpose of the Transfer of Practice checklist is to guide the researcher in determining if any artifacts from the participants environment support their transfer of practices from a two-year professional development program. In addition, the checklist will be used as a form of triangulating data with information from the Teacher Background Survey, the semi-structured interview and the focus group.

### Reference

Engle, R. A., Lam, D., Meyer, X. S., & Nix, S. E. (2012). How does expansive framing promote transfer? Several proposed explanations and a research agenda for investigating them. *Educational Psychologist*, 47(3), 215–231.



### Transfer of Practice Checklist

	Observed	Not Observed	Examples of Artifacts	Influence (rationale for implementation)		
				E	P	B
1. Is there evidence of the teaching of and/or student learning of vocabulary?						
2. Is there evidence of the teaching of and/or student learning of text structure?						
3. Is there evidence of the teaching of and/or student learning of question generation?						
4. Is there evidence of differentiated instruction?						
5. Is there evidence of interactive tasks?						
6. Is there evidence of cognitively-rich environments?						
7. Is there evidence of students reading expository text?						
8. Is there evidence of teacher engagement in professional development activities?						
9. Is there evidence of teacher motivation in wanting to grow professionally?						
10. Other:						

#### Possible Artifacts

**Teacher Evidence:** environmental print (e.g., word walls, teacher-made charts), lesson plans, student grouping charts, certificates in professional development sessions, student access to expository texts/books

**Student Evidence:** student generated work (e.g., readers' notebook), publisher activities (e.g., worksheets), assessments/tests, multimodal literacies (e.g., power points), self-assessments, group assessments

#### Influences

**Environment:** reasons for implementation are a result of external factors from within the school

**Person:** reasons for implementation are a result of internal factors from within the person

**Behavior:** reasons for implementation are a result of external factors within the school and internal factors from within person.

## Appendix D

### Focus Group Protocol

#### Focus Group Protocol

*The Journey After: A Phenomenological Examination of Teachers' Transfer of Learning From a Two-Year Professional Development Program*

**Welcome.** Welcome and thank you for agreeing to participate in my research study. All of you have been invited because of your participation in the Pacific CHILD program that was sponsored by PREL. The purpose of this interview is to gain an in-depth description of your transfer or lack of transfer of your learning process from Pacific CHILD. Your experiences are important because it will help me understand if and how you have used Pacific CHILD since the study has ended. I know you have a busy schedule and I appreciate the time all of you are taking to share your experiences.

Please keep in mind:

- There are no right or wrong answers to the questions that I will ask.
- Your responses are confidential. I will not identify your name or school when I have summarized the learning.
- Be respectful of everyone's opinion. You do not have to agree with each other.
- You may choose to skip any questions or stop your participation if you feel uncomfortable.

#### Focus Group Questions.

1. From your perspective, what did you value from Pacific CHILD?
2. What do you consider to be an example of the Pacific CHILD professional development that was or was not meaningful to you?
3. One definition of transfer of learning is using knowledge and skills from previous situation and then applying them in your current context. What knowledge and/or strategies did you gain from any professional development, including Pacific CHILD that you are currently implementing in your classroom?
4. From your perspective, what conditions must be in place for you to transfer learning from professional development sessions into your school/classroom/context?



5. Motivation is considered one attribute to facilitate professional growth. What are examples that have motivated you to use strategies from Pacific CHILD or any other professional development experience into your classroom?
6. Some people claim that professional development providers should have a good understanding of the context or setting of teachers that they are working with. From your perspective, what were important contextual factors from Pacific CHILD that may have helped you grow professionally? What are contextual factors that Pacific CHILD did not take into consideration to help you grow professionally?
7. Is there anything you would like to add about your experience after Pacific CHILD that you would like to discuss?

**Closing statements.** Now that we are finished, I would like to remind you that this recorded session will be transcribed. I will email you a copy of the transcription of your speaking parts to verify and make revisions as you wish. You will then read and send me any revisions or a confirmation that that the transcription is accurate. I will give you a pseudonym to ensure your identity will remain anonymous. All the information collected will be destroyed. Do you have any questions? Thank you again for your participation and contributing to this research.

(Collect a non-work related email address)

## Appendix E

### Approval of Exempt Study



UNIVERSITY  
of HAWAII®  
MĀNOA

Office of Research Compliance  
Human Studies Program

March 25, 2015

TO: Jennifer Padua  
Principal Investigator  
COE – Curriculum Studies

FROM: Denise A. Lin-DeShetler, MPH, MA  
Director

A handwritten signature in black ink, appearing to read "Denise A. Lin-DeShetler".

SUBJECT: CHS #22955 - "The Journey After: A Phenomenological Examination of Teachers'  
Transfer of Learning from a Two-Year Professional Development  
Program"

This letter is your record of the Human Studies Program approval of this study as exempt.

On March 25, 2015, the University of Hawai'i (UH) Human Studies Program approved this study as exempt from federal regulations pertaining to the protection of human research participants. The authority for the exemption applicable to your study is documented in the Code of Federal Regulations at 45 CFR 46.101(b) (Category 2).

Exempt studies are subject to the ethical principles articulated in The Belmont Report, found at <http://www.hawaii.edu/irb/html/manual/appendices/A/belmont.html>

Exempt studies do not require regular continuing review by the Human Studies Program. However, if you propose to modify your study, you must receive approval from the Human Studies Program prior to implementing any changes. You can submit your proposed changes via email at [uhirb@hawaii.edu](mailto:uhirb@hawaii.edu). (The subject line should read: Exempt Study Modification.) The Human Studies Program may review the exempt status at that time and request an application for approval as non-exempt research.

In order to protect the confidentiality of research participants, we encourage you to destroy private information which can be linked to the identities of individuals as soon as it is reasonable to do so. Signed consent forms, as applicable to your study, should be maintained for at least the duration of your project.

This approval does not expire. However, please notify the Human Studies Program when your study is complete. Upon notification, we will close our files pertaining to your study.

If you have any questions relating to the protection of human research participants, please contact the Human Studies Program at 956-5007 or [uhirb@hawaii.edu](mailto:uhirb@hawaii.edu). We wish you success in carrying out your research project.

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Telephone: (808) 956-5007  
Fax: (808) 956-8683

An Equal Opportunity/Affirmative Action Institution

## Appendix F

### Consent to Participate in Semi-structured Interview and Focus Group

#### University of Hawai'i

#### Consent to Participate in Research Project:

*The Journey After: A Phenomenological Examination of Teacher's Transfer of Learning From a Two-Year Professional Development Program*

My name is Jennifer F.M. Padua. I am a doctoral student at the University of Hawaii at Mānoa in the Department of Curriculum Studies in the College of Education. This research project is part of the requirements for earning my doctorate degree. The purpose of my project is to examine what teachers learned as a result of participating in the Pacific Communities with High-performance In Literacy Development (Pacific CHILD) study that was conducted by Pacific Resources from Education and Learning (PREL). I am asking you to participate in the interview and focus group because you had participated in Pacific CHILD.

**Activities and Time Commitment:** If you participate in this project, you will participate in two semi-structured interviews and one focus group.

- Semi-structured interviews. I will meet with you for two interviews. One interview will be held in [REDACTED] the other interview will be online or via conference call at a location and time convenient for you. The interviews will be 60-90 minutes. The interview will consist of 10-15 open-ended questions. Interview questions will include questions such as, "Since Pacific CHILD, what other professional development activities have you participated in?" "How do you determine which specific activities/strategies to continue to implement?" Only you and I will be present during the interview. I will audio-record the interview so that I can later transcribe the interview and analyze the responses. A copy of the transcript will be sent to you to verify accuracy and to add or clarify any information you wish. The transcript will be sent via email at a non-work related email provided by you. This transcript should not be accessed on a work computer or a home computer connected to the participant's school system. The audio recordings will be stored on a secured computer using a password-protected file. Once the participant has sent confirmed accuracy and/or provided revisions, the audio recordings will be destroyed. The transcripts may be used as information in other academic projects (e.g., journal articles, conference presentations). You will be one of about 11 people whom I will interview for this study.
- Focus group. I will convene a focus group of 4-6 people at a central location in [REDACTED] and time that is convenient to the group. The focus group will consist of 10-12 open-ended questions and estimated to take 60-90 minutes. Focus group questions will include questions such as, "What do you consider to be an example of meaningful professional development that you have participated in since Pacific CHILD?" "What suggestions do you have for administrators or others who would like to conduct professional development activities in the CNMI?" I will audio-record the interview so that I can later transcribe the discussion and analyze the responses. A

copy of the transcript from the focus group will be sent to you. This is to verify accuracy and to add/or clarify any information you wish. The transcript will be sent via email at a non-work related email provided by you. This transcript should not be accessed on a work computer or a home computer connected to the participant's school system. The audio recordings will be stored on a secured computer using a password-protected file. Once you have sent confirmation of accuracy and/or provided revisions, the audio recordings will be destroyed. The transcripts may be used as information in other academic projects (e.g., journal articles, conference presentations). Please be advised that although the researcher will take every precaution to maintain confidentiality of the data, the nature of the focus groups prevents the researcher from guaranteeing confidentiality. The researcher will advise and remind all participants not to disclose anything said within the context of the discussion. By agreeing to participate, you agree to not to disclose to others outside of this event anything said within the context of the discussion.

**Benefits and Risks:** There will be no direct benefit to you for participating in this interview. The results of this project may help contribute to the current body of knowledge on how teachers transfer their learning from professional development into their own classroom. I believe there is little risk to you in participating in this research project. If you do become stressed or uncomfortable answering any of the interview questions or discussing topics with me during the interview, you can skip the question or take a break. You can also stop the interview or you can withdraw from the project altogether.

**Privacy and Confidentiality:** I will keep all information in a safe place. Only my University of Hawaii advisor and I will have access to the information. Other agencies that have legal permission have the right to review research records. The University of Hawaii Human Studies Program has the right to review research records for this study. After I write a copy of the interviews, I will erase or destroy the audio-recordings. When I report the results of my research project, I will not use your name. I will not use any other personal identifying information that can identify you. I will use pseudonyms (fake names) and report my findings in a way that protects your privacy and confidentiality to the extent allowed by law.

**Voluntary Participation:** Your participation in this project is completely voluntary. You may stop participating at any time. If you stop being in the study, there will be no penalty or loss to you.

You will receive a \$15 gift card for your time and effort in participating in this research project and compensation for mileage to travel to the interview and/or focus group meeting.

**Questions:** If you have any questions about this study, please contact me via phone at (808) 690-4142 or via email at paduajen@hawaii.edu. You may also contact my advisor, Dr. Sarah Twomey, at (808) 956-5898 or via email at twomey@hawaii.edu. If you have questions about your rights as a research participant, you may contact the UHM Human Studies Program at (808) 956-5007 or uhirb@hawaii.edu.

If you agree to participate in this project, please sign and date this signature page and return it to:

Jennifer Padua  
UHM College of Education, ITE Elementary  
1776 University Ave  
Everly Hall, Rm 223  
Honolulu, Hawaii 96822

**Signature(s) for Consent:**

I give permission to join the research project entitled, *The Journey After: A Phenomenological Examination of Teacher's Transfer of Learning From a Two-Year Professional Development Program*.

Please initial next to either "Yes" or "Not" to the following:

<input type="checkbox"/> Yes	<input type="checkbox"/> No	I consent to be audio-recorded for the interview and the focus group portion of this research.
<input type="checkbox"/> Yes	<input type="checkbox"/> No	I give permission to allow the investigator to use my real name to be used for the publication of this research

**Name of Participant (Print):** \_\_\_\_\_

**Participant's Signature:** \_\_\_\_\_

**Signature of the Person Obtaining Consent:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## Appendix G

### Approved Modification Request to Exempt Study



UNIVERSITY  
of HAWAII  
SYSTEM

Jennifer Padua <paduajen@hawaii.edu>

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#### Re: Modification Request to Exempt Study: CHS #22955

1 message

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Human Studies Program <uhirb@hawaii.edu>  
To: Jennifer Padua <paduajen@hawaii.edu>

Fri, Jun 5, 2015 at 3:01 PM

Dear Ms. Padua,

The request for IRB approval of changes to your exempt project noted above has been reviewed and approved. The proposed amendments will be added into your current project file. The proposed changes do not alter the exempt status of your project.

Thank you for keeping us informed about the progress of this study.

Best wishes,  
Heidianne Ho

On Fri, Jun 5, 2015 at 2:46 PM, Jennifer Padua <paduajen@hawaii.edu> wrote:  
Dear Ms. Ho,

Attached you find the addition of a signature, print, and date lines on the revised instrument. Please let me know if you need more information.

Jennifer

On Sat, Jun 6, 2015 at 9:38 AM, Human Studies Program <uhirb@hawaii.edu> wrote:  
Dear Ms. Padua,

Thank you for your email. Please add signature, print and date lines to the end of your consent form then re-submit.

Mahalo,  
Heidianne Ho

On Thu, May 28, 2015 at 11:46 AM, Jennifer Padua <paduajen@hawaii.edu> wrote:  
Dear Human Studies Program,

I am submitting a modification request to my exempt study, "The Journey After: A Phenomenological Examination of Teachers' Transfer of Learning from a Two-Year Professional Development Program", CHS #22955. My modifications include a Transfer of Practice Checklist instrument tool that will be used during the semi-structured interview and a participant consent form. After consultation from my dissertation committee, it is apparent that I need additional data to verify if any practices have been transferred into the participant's environment. The checklist will also be used to triangulate data with other data methods (e.g., survey, semi-structured interview, focus group). The checklist will be used during non-instructional time and no students will be present. To date, no interviews have taken place.

Per my phone conversation with Donna from the Human Studies Program, I do not need to submit the Request for IRB Approval of a Study Modification form since this is an exempt study

I have attached the Transfer of Practice Checklist instrument, the Participant Consent form, and the IRB approval memo. Please let me know if additional information is needed as I will be traveling to Saipan to collect data in early June.

## Appendix H

### Results from Teacher Background Survey (Practitioner)

**Instructional Practices Prompt:** Please indicate **how often** you use the following instructional techniques in your classroom during the 2013-2015 school years. (Provide one response per row)

<i>Please indicate how often you use the following instructional practices in your classroom during the 2013-2015 school years. (Provide one response per row)</i>	Never/ Rarely	1-2 times per month	1-2 times per week	1-2 times per day	Not Applicable (does not apply to my context/role)
a. Explicitly teach academic language particular to English Language Arts	22.2%	11.1%	11.1%	44.4%	11.1%
b. Use multiple techniques to make concepts and tasks clear (e.g., visuals, manipulatives, realia, modeling)	22.2%	11.1%	0%	55.6%	11.1%
c. Provide below-grade level materials available for students with lower English proficiency	0%	0%	22.2%	55.6%	11.1%
d. Provide opportunities for all students to use higher-order thinking skills (e.g., problem solving, predicting, organizing, evaluation, self-monitoring)	0%	22.2%	11.1%	55.6%	11.1%
e. Simplify language input to make it more comprehensible to English language learners*	22.2%	0%	0%	66.7%	11.1%
f. Use the students' primary language to clarify concepts	33.3%	0%	22.2%	33.3%	11.1%
g. Adjust expectations for students whose limited English proficiency prevents them from meeting instructional targets	22.2%	11.1%	0%	33.3%	11.1%
h. Provide students with extra wait time	0%	22.2%	0%	66.7%	11.1%
i. Explicitly teach reading comprehension strategies	22.2%	0%	11.1%	55.6%	11.1%
j. Group students by their proficiency in English	22.2%	0%	22.2%	33.3%	22.2%
k. Create groups of students, each consisting of students with the <u>same</u> skill/comprehension levels	33.3%	0%	11.1%	44.4%	11.1%

<i>Please indicate how often you use the following instructional practices in your classroom during the 2013-2015 school years. (Provide one response per row)</i>	<b>Never/ Rarely</b>	<b>1-2 times per month</b>	<b>1-2 times per week</b>	<b>1-2 times per day</b>	<b>Not Applicable (does not apply to my context/role)</b>
l. Create groups of students, each consisting of students with <u>different</u> skill/comprehension levels	11.1%	0%	11.1%	55.6%	11.1%
m. Explicitly correct student speaking errors (e.g., pronunciation, grammar)	0%	0%	0%	88.8%	11.1%

Comments from Not Applicable

- My role as an instructor in the School of Education at the Veritas College is to teach pre-service teachers (teachers-in-training) teaching strategies, curriculum, methodology, and provide mentoring during practicum courses.
- J - homogenous or heterogeneous grouping? I believe this is address in k and l.



**Instructional Techniques Prompt:** Please indicate how frequently do you typically **ask your students**, including diverse learners (e.g., English language learners and special education students), to engage in the following activities **during the 2013-2015 school years**. (Provide one response per row)

<i>Please indicate how frequently do you typically <b>ask your students</b>, including diverse learners (e.g., English language learners and special education students), to engage in the following activities during the 2013-2015 school years.</i>	<b>Never/ Rarely</b>	<b>1-2 time per month</b>	<b>1-2 times per week</b>	<b>1-2 times per day</b>	<b>Not Applicable (does not apply to my context/role)</b>
a. Develop oral or written summaries of reading	33.3%	11.1%	11.1%	44.4%	11.1%
b. Evaluate their own work	11.1%	11.1%	44.4%	11.1%	11.1%
c. Complete workbook or textbook exercises in class	0%	0%	55.5%	33.3%	11.1%
d. Evaluate a piece of work completed by another student	11.1%	11.1%	33.3%	22.2%	11.1%
e. Memorize vocabulary, facts, rules, or procedures	22.2%	0%	11.1%	44.4%	11.1%
f. Engage in discussions about the assigned reading	0%	22.2%	11.1%	55.5%	11.1%
g. Listen to lectures and take notes	33.3%	0%	22.2%	33.3%	11.1%
h. Work in small groups of two or more students	0%	0%	11.1%	77.7%	11.1%
i. Recite poetry, speeches, or passages from memory	44.4%	11.1%	22.2%	11.1%	11.1%
j. Use data and text references to support their ideas	33.3%	11.1%	33.3%	11.1%	11.1%
k. Complete tests or quizzes	22.2%	0%	44.4%	22.2%	11.1%

Comments from Not Applicable

- Though I am not in the classroom setting with students ranging from K to 12, the strategies I have learned through the PCHILD project are applicable in my courses and I teach in my courses such as differentiated instruction, explicitly teaching academic vocabulary, etc.

**School Context Prompt:** This part is to understand your current context (e.g., school, classroom environment, students). To what extent is each of the following a challenge at your school? (Place an X in one box per row)

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.

<i>To what extent is each of the following a challenge at your school?</i>	<b>Not a Challenge</b>	<b>Minor Challenge</b>	<b>Moderate Challenge</b>	<b>Serious Challenge</b>	<b>Not Applicable</b> (does not apply to my context/role)
a. Shortage of teachers that work with English language learners*	22.2%	22.2%	22.2%	0%	33.3%
b. Time for teachers to collaborate	22.2%	44.4%	0%	0%	22.2%
c. A high proportion of English language learners*	11.1%	33.3%	22.2%	0%	33.3%
d. Student behavior/discipline	11.1%	44.4%	33.3%	0%	11.1%
e. Lack of community or parent support	0%	55.5%	22.2%	11.1%	11.1%
f. Lack of student motivation	0%	11.1%	55.5%	22.2%	11.1%
g. Lack of appropriate materials for students	44.4%	22.2%	22.2%	0%	11.1%
h. Collegiality among faculty	55.5%	33.3%	0%	0%	11.1%
i. Lack of administrative support	77.7%	11.1%	0%	0%	11.1%
j. Lack of professional development opportunities	55.5%	33.3%	0%	0%	11.1%

**Language Arts Prompt:** This part is to understand the English Language Arts in your current context. Provide one response per row. To what extent do you agree with the following statements? *“My ability to teach to the English Language Arts standards is limited by...”*

\*An English language learner is defined as the student’s primary language to communicate is in another language that is not English.

<i>“My ability to teach to the English Language Arts standards is limited by...”</i>	<b>Not at All</b>	<b>Very Little</b>	<b>Somewhat</b>	<b>A Great Deal</b>	<b>Not Applicable</b> (does not apply to my context/role)
a. The number of English language learners in my class/school*	11.1%	33.3%	22.2%	0%	33.3%
b. The number of students in my class	44.4%	0%	22.2%	11.1%	11.1%
c. The low ability of my students	33.3%	11.1%	33.3%	11.1%	11.1%
d. The level of parent or community support	22.2%	22.2%	33.3%	11.1%	11.1%
e. My knowledge of working with English language learners*	22.2%	33.3%	33.3%	0%	11.1%
f. The range of students’ needs in my class/school	33.3%	11.1%	44.4%	0%	11.1%
g. A lack of support from principals/administrators	55.5%	22.2%	0%	11.1%	11.1%
h. My knowledge of the content area	55.5%	11.1%	0%	11.1%	22.2%
i. A lack of support from other teachers	55.5%	33.3%	0%	0%	11.1%
j. My lack of fluency in the English language	77.7%	11.1%	0%	0%	11.1%
k. The requirement that instruction can be ONLY in English	66.6%	22.2%	0%	0%	11.1%

Comments from Not Applicable

- I teach math.

**Pacific CHILD Prompt:** This is to understand your knowledge and ability of Pacific CHILD since your participation. Provide one response per row. Since your participation in Pacific CHILD, rate **your ability** on the following behaviors (Place an X in one box per row). [need to fix prompt and align with tool for appendix]

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.

	Not effective at all	Not very effective	Somewhat effective	Very effective	Don't know
a. Your knowledge regarding the needs of English language learners*	0%	0%	44.4%	33.3%	22.2%
b. Your confidence in implementing the Pacific CHILD components in the classroom	0%	22.2%	22.2%	55.5%	0%
c. Your awareness of the cultures of English language learners*	0%	22.2%	22.2%	55.5%	0%
d. Your knowledge regarding reading comprehension strategies	0%	22.2%	11.1%	66.6%	0%
e. Your use of the text structures (e.g., cause and effect, compare and contrast)	0%	22.2%	11.1%	66.6%	0%
f. Your use of vocabulary development techniques with students	0%	0%	33.3%	66.6%	0%
g. Your ability to differentiate instruction	22.2%	0%	33.3%	44.4%	0%
h. Your use of flexible grouping strategies	0%	22.2%	55.5%	22.2%	0%
i. Your knowledge of English language development	11.1%	22.2%	22.2%	44.4%	0%
j. Your ability to incorporate interactive tasks into your lessons	0%	22.2%	22.2%	55.5%	0%
k. Your ability to create a cognitively rich environment in the classroom	0%	22.2%	22.2%	55.5%	0%
l. Your use of text features	0%	22.2%	0%	66.6%	11.1%

## Appendix I

### Results from Teacher Background Survey (Administrator)

**Instructional Practices Prompt:** Please indicate how frequently do you typically **ask your staff** to engage in the following activities with their students, including diverse learners (e.g., English language learners and special education students) **during the 2013-2015 school years.** (Provide one response per row)

<i>Please indicate how frequently do you typically ask your staff to engage in the following activities with their students, including diverse learners (e.g., English language learners and special education students) during the 2013-2015 school years. (Provide one response per row)</i>	<b>Never/ Rarely</b>	<b>1-2 times per month</b>	<b>1-2 times per week</b>	<b>1-2 times per day</b>	<b>Not Applicable (does not apply to my context/rol e)</b>
a. Explicitly teach academic language particular to English Language Arts	0%	100%	0%	0%	0%
b. Use multiple techniques to make concepts and tasks clear (e.g., visuals, manipulatives, realia, modeling)	0%	100%	0%	0%	0%
c. Provide below-grade level materials available for students with lower English proficiency	0%	100%	0%	0%	0%
d. Provide opportunities for all students to use higher-order thinking skills (e.g., problem solving, predicting, organizing, evaluation, self-monitoring)	0%	100%	0%	0%	0%
e. Simplify language input to make it more comprehensible to English language learners*	0%	50%	50%	0%	0%
f. Use the students' primary language to clarify concepts	0%	100%	0%	0%	0%
g. Adjust expectations for students whose limited English proficiency prevents them from meeting instructional targets	0%	100%	0%	0%	0%
h. Provide students with extra wait time	0%	50%	50%	0%	0%
i. Explicitly teach reading comprehension strategies	0%	50%	50%	0%	0%
j. Group students by their proficiency in English	0%	100%	0%	0%	0%
k. Create groups of students, each consisting of students with the <u>same</u> skill/comprehension levels	0%	100%	0%	0%	0%
l. Create groups of students, each consisting of students with <u>different</u> skill/comprehension levels	0%	100%	0%	0%	0%
m. Explicitly correct student speaking errors (e.g., pronunciation, grammar)	50%	50%	0%	0%	0%

**Instructional Techniques Prompt:** Please indicate how frequently do you typically **ask your staff** to engage in the following activities with their students, including diverse learners (e.g., English language learners and special education students) **during the 2013-2015 school years.** (Provide one response per row)

Please indicate how frequently do you typically <b>ask your staff</b> to engage in the following activities with their students, including diverse learners (e.g., English language learners and special education students) <b>during the 2013-2015 school years.</b> (Provide one response per row)	Never/ Rarely	1-2 times per month	1-2 times per week	1-2 times per day	Not Applicable (does not apply to my context/role)
a. Develop oral or written summaries of reading	50%	50%	0%	0%	0%
b. Evaluate their own work	0%	100%	0%	0%	0%
c. Complete workbook or textbook exercises in class	0%	100%	0%	0%	0%
d. Evaluate a piece of work completed by another student	50%	50%	0%	0%	0%
e. Memorize vocabulary, facts, rules, or procedures	0%	100%	0%	0%	0%
f. Engage in discussions about the assigned reading	0%	100%	0%	0%	0%
g. Listen to lectures and take notes	50%	50%	0%	0%	0%
h. Work in small groups of two or more students	0%	100%	0%	0%	0%
i. Recite poetry, speeches, or passages from memory	50%	50%	0%	0%	0%
j. Use data and text references to support their ideas	0%	100%	0%	0%	0%
k. Complete tests or quizzes	0%	100%	0%	0%	0%

**School Context Prompt:** This part is to understand your current context (e.g., school, classroom environment, students). To what extent is each of the following a challenge at your school? (Place an X in one box per row)

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.

<i>To what extent is each of the following a challenge at your school?</i>	<b>Not a Challenge</b>	<b>Minor Challenge</b>	<b>Moderate Challenge</b>	<b>Serious Challenge</b>	<b>Not Applicable</b> (does not apply to my context/role)
a. Shortage of teachers that work with English language learners*	0%	0%	50%	50%	0%
b. Time for teachers to collaborate	0%	50%	50%	0%	0%
c. A high proportion of English language learners*	0%	0%	50%	50%	0%
d. Student behavior/discipline	0%	0%	50%	50%	0%
e. Lack of community or parent support	0%	0%	0%	100%	0%
f. Lack of student motivation	0%	50%	50%	0%	0%
g. Lack of appropriate materials for students	0%	100%	0%	0%	0%
h. Collegiality among faculty	50%	50%	0%	0%	0%
i. Lack of administrative support	50%	50%	0%	0%	0%
j. Lack of professional development opportunities	0%	50%	50%	0%	0%

**English Language Arts Prompt:** This part is to understand the English Language Arts in your current context. Provide one response per row. To what extent do you agree with the following statements? *“My ability to lead the staff in my school to teach the English Language Arts standards is limited by...”*

\*An English language learner is defined as the student’s primary language to communicate is in another language that is not English.

<i>“My ability to lead the staff in my school to teach the English Language Arts standards is limited by...”</i>	<b>Not at All</b>	<b>Very Little</b>	<b>Somewhat</b>	<b>A Great Deal</b>	<b>Not Applicable</b> (does not apply to my context/role)
a. The number of English language learners in my class/school*	0%	50%	0%	50%	0%
b. The number of students in each class/my school	0%	0%	100%	0%	0%
c. The low ability of my students	0%	50%	50%	0%	0%
d. The level of parent or community support	0%	0%	100%	0%	0%
e. My knowledge of working with English language learners*	0%	0%	50%	50%	0%
f. The range of students’ needs in each class/ my school	0%	0%	50%	50%	0%
g. A lack of support from principals/administrators	0%	50%	50%	0%	0%
h. My knowledge of the content area	0%	0%	100%	0%	0%
i. A lack of support from other teachers	0%	50%	50%	0%	0%
j. My lack of fluency in the English language	0%	100%	0%	0%	0%
k. The requirement that instruction can be ONLY in English	0%	0%	100%	0%	0%



**Pacific CHILD Prompt:** This is to understand your knowledge and ability of Pacific CHILD since your participation. Provide one response per row. Since your participation in Pacific CHILD, rate **your ability** on the following behaviors (Place an X in one box per row). [need to fix prompt and align with tool for appendix]

\*An English language learner is defined as the student's primary language to communicate is in another language that is not English.

	Not effective at all	Not very effective	Somewhat effective	Very effective	Don't know
a. Your knowledge regarding the needs of English language learners*	0%	0%	100%	0%	0%
b. Your confidence in implementing the Pacific CHILD components in the classroom	0%	0%	50%	50%	0%
c. Your awareness of the cultures of English language learners*	0%	0%	50%	50%	0%
d. Your knowledge regarding reading comprehension strategies	0%	0%	50%	50%	0%
e. Your use of the text structures (e.g., cause and effect, compare and contrast)	0%	0%	50%	50%	0%
f. Your use of vocabulary development techniques with students	0%	0%	50%	50%	0%
g. Your ability to differentiate instruction	0%	0%	50%	50%	0%
h. Your use of flexible grouping strategies	0%	0%	50%	50%	0%
i. Your knowledge of English language development	0%	0%	100%	0%	0%
j. Your ability to incorporate interactive tasks into your lessons	0%	0%	50%	50%	0%
k. Your ability to create a cognitively rich environment in the classroom	0%	0%	50%	50%	0%
l. Your use of text features	0%	0%	50%	50%	0%

## REFERENCES

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